

MĀORI SUBJECT HEADINGS WORKING PARTY

REPORT TO LIANZA/ TE RAU HERENGA O AOTEAROA AND TO TE RŌPŪ WHAKAHAU

AUGUST 2001

PHASE TWO

ABSTRACT

This is the final report of the Phase Two Māori Subject Headings Working Party. It summarises progress to date and presents updated draft guidelines for using Māori Subject Headings, along with recommendations for further work to be done. The Working Party members are named and acknowledgements made.

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PART TWO

MSH Draft Guidelines

TERMS OF REFERENCE

The Māori Subject Headings Working Party Phase Two was charged to continue the work from Phase One and to address its recommendation to focus “on the development of the list of subject headings following the guidelines developed.”¹ Appendix Two (Recommendations for the second phase)² of the Working Party’s March 2000 report were adopted as the terms of reference for the second phase. These were:

- That the Māori Subject Headings (MSH) are developed
- That topical MSH are developed based on the principles and structures presented in the draft guidelines
- That topical, time and form subdivisions are established
- That guidelines for place subdivisions are established

¹ Māori Subject Headings Working Party (MSHWP) Final report to LIANZA / Te Rau Herenga O Aotearoa and to Te Rōpū Whakahau (March 2000) p 4.

² *ibid* p 20

- That scope notes in Māori are provided to facilitate access for speakers of te reo Māori, the Māori language, where resources permit
- That an authoritative list of waka tīpuna, iwi and hapū names is developed
- That mechanisms are developed for making the MSH list available to potential users
- That a system be considered for the ongoing growth and maintenance of the MSH list, under the auspices of a monitoring group
- That mechanisms are developed for:
 - adding terms to the MSH list
 - deciding between synonyms where a preferred term cannot readily be established
 - creating a greater level of detail for topics, where required
- That quality control processes are developed for correcting or modifying entries in the MSH list
- That an application is made to the Library of Congress for MSH to be added to the *USMARC Code List for Relators, Sources, Description Conventions*
- That the future and usefulness of the MaSHreo list-serv is considered
- That an appendix outlining the system implications of MSH is developed. This might include:
 - how the MSH headings display in online catalogues
 - how the MSH headings are indexed and searched in a local system
 - dealing with terms that may be preferred in LC/AACR2R and non-preferred in MSH, and vice versa
 - how to deal with macrons
 - implication of downloading records containing MSH headings from Te Puna
 - the problem of some MSH being the same as some LCSH forms
 - global change issues

BACKGROUND AND SUMMARY OF THE WORKING PARTY'S ACTIVITIES

Phase One Working Party members, Chris Todd and Glenn Taitoko agreed to continue working on Phase Two of this Project. They met 30 June 2000 to discuss a work plan for the continuation of the project. It was agreed that addressing the recommendations for the second phase, and, the issues that were identified in Phase One, were the objectives and the terms of reference for the Phase Two Working Party. The recommendations were then grouped into three different categories.

1. **Technical and cataloguing issues;** recommendations:
 - That an application is made to the Library of Congress for MSH to be added to the *USMARC Code List for Relators, Sources, Description Conventions*; and
 - That an appendix outlining the system implications of MSH is developed
2. **Development and creation of Māori language terms;** recommendations:
 - That the MSH are developed
 - That topical MSH are developed based on the principles and structures presented in the draft guidelines
 - That topical, time and form subdivisions are established
 - That guidelines for place subdivisions are established

- That scope notes in Māori are provided to facilitate access for speakers of te reo Māori, the Māori language, where resources permit
 - That an authoritative list of waka tipuna, iwi and hapū names is developed
 - That mechanisms are developed for adding terms to the MSH, and, creating a greater level of detail for topics, where required
 - That quality control processes are developed for correcting or modifying entries in the MSH list
3. **Overarching Issues;** recommendations that fell into both categories
- That mechanisms are developed for making the MSH list available to potential users
 - That a system be considered for the ongoing growth and maintenance of the MSH list, under the auspices of a monitoring group
 - That mechanisms are developed for deciding between synonyms where a preferred term cannot readily be established
 - That the future and usefulness of the MaSHreo list-serv is considered
 - The problem of some MSH being the same as some LCSH forms
 - Global change issues

It was agreed that Chris would take responsibility for addressing the technical and cataloguing issues and Glenn the development and creation of the Māori language terms. Together they would address those overarching recommendations. Progress reports between the two would be made at irregular intervals or when issues arose. The need for a project manager (who would co-ordinate the work and liaise between LIANZA / TRW and the Working Party) was discussed and a bid for funding (to cover the costs of travel and accommodation for working party members to attend meetings) was drafted. An update on the status of the Project plus a request for a project manager and the bid for funding were presented to the LIANZA National Council at their meeting on 24 August 2000. Council granted the funding bid for \$2000.00, and also agreed to contract a Project Manager. Mihi Harris was appointed Project Manager on 15 November 2000.

At the LIANZA Conference 2000 (Christchurch) Glenn gave a presentation on the status of the project and the strategies for its future development. The presentation was well received by those who attended and Glenn received encouraging comments in support of the Project.

Throughout this time certain members of TRW had been approached to assist in developing the Māori language terms. In September 2000, on recommendations from TRW members, other people with skill in te reo Māori and/or tikanga and/or library cataloguing processes were also invited to participate. The first meeting of this group was held at the National Library of New Zealand (NLNZ) Centre in Hamilton on 20th and 21st November 2000. The group agreed that, to avoid confusion between the Working Party and any other groups working on this project, they were to be referred to as Pu Ki Te Tauria. A brief history of the project to date and the expected outcomes from Pu Ki Te Tauria were outlined. It was confirmed that the outcomes were the terms of reference and a strategic plan to achieve the objectives was developed. Discussion during the first day focussed on the structure of the list, and a resolution to the issue of iwi/regional dialectal variations of terms. On day two, discussion focussed on developing a standard process to create MSH. The issue of perspective sub-divisions (contemporary or traditional) was also discussed. At the conclusion of this meeting specific tasks were assigned to each member, and it was agreed that members would provide feedback reports at future meetings.

The Working Party met on December 2000 at the NLNZ, Wellington. Chris Todd had requested the meeting to inform members of her withdrawal from the project and to hand over to those replacing her. Chris had spoken with Maria Heenan and Robyn East (from Phase One Working Party) both of NLNZ and invited them to replace her on the Working Party. The status of the Project and the issues relating specifically to cataloguing and technical aspects were highlighted. Both Maria and Robyn agreed to participate in the Project in the capacity of providing comment on cataloguing and technical issues, and,

to liaise between the Working Party and the NLNZ where necessary. It was also agreed that Maria and Robyn would be invited to future meetings of Pu Ki Te Tauria.

The Working Party, with Peggy McConnell (a member of Pu Ki Te Tauria), met again on 31 January 2001 at NLNZ, Wellington. Tracy Powell (Indexing Services, NLNZ) demonstrated MultiTes, a thesaurus development software used by NLNZ. It was agreed that members of Pu Ki Te Tauria would evaluate and report back on the software for MSH use. Maria advised that she had drafted a concept check paper to present to NLNZ management. The concept paper was a pre-requisite to preparing a project proposal that would seek NLNZ contribution to the MSH Project.

Pu Ki Te Tauria and the Working Party met at Te Puni Kōkiri Head Office (Wellington) on 13 February 2001. Maria and Robyn were introduced to the team. Members presented feedback on strategic actions and carried out strategic planning. The NLNZ's concept check paper and the MultiTes software evaluation were discussed. The main focus of this meeting was to evaluate and further enhance the standard process drafted at the first meeting.

On 5 March 2001 the Working Party was invited to meet with the NLNZ Steering Committee that had been established by the project proposal for contributing to the MSH Project. At this meeting the proposal and the process for establishing it as a project for NLNZ was discussed. The Working Party was asked to comment on the issues and risks identified in the proposal. It was agreed at this meeting that the Steering Committee would be kept informed of any developments within the MSH Project that would impact specifically on the contribution outlined in the NLNZ's project proposal. The project proposal identified staff to contribute to the MSH Project, the scope of their involvement, deliverables, issues and risks. It was confirmed at the meeting that the project proposal would be accepted as a project for the NLNZ. This commitment by the NLNZ to the MSH Project, is a great achievement towards the progression of the MSH Project, and the Working Party gratefully acknowledges the support and contribution made by the NLNZ.

On 14 May 2001 the Working Party and Pu Ki Te Tauria gathered for the final meeting of this phase. The meeting was specifically focussed on ensuring terms of reference had been met and if not, addressing the reasons why. Recommendations to LIANZA & TRW, on the future development and progress of the Project, were drafted.

OUTCOMES

The following details the outcomes under each of the Phase Two Working Party's Terms of Reference.

That the MSH are developed

The development of MSH has begun with the creation of subdivisions. A standard process that allows for topical MSH to be created has been developed³. Developing MSH is an ongoing process. The Working Party and Pu Ki Te Tauria agree that it requires full time effort to progress the development of MSH. It is not reasonable to expect, nor feasible for, MSH Working Party members or others in full time employment, to also develop MSH and build the MSH list. To continue the development of MSH on a voluntary basis will lengthen the time to completion and ultimately delay application of MSH. The Working Party and Pu Ki Te Tauria agree that a commitment to fulltime effort is now required. To determine the amount of time required to create the MSH list, it is recommended that a trial period of one

³ Māori Subject Headings draft guidelines, August 2001; Appendix Two - Standard process for the development & creation of MSH

month with one fulltime person working on the development of topical headings and data entry of MSH be implemented. Pu Ki Te Tauria recommend that this person concentrate on the development of topical MSH in the following areas:

- Education
- Social Issues
- Health
- Treaty of Waitangi
- Tikanga / Māori culture

That topical MSH are developed based on the principles and structures presented in the draft guidelines

The principles and structures in the draft guidelines from Phase One were adhered to. Where necessary, these have been amended or expanded.

That topical, time and form subdivisions are established

Subdivisions for form and time have been established (see Appendices Two and Three). Topical subdivisions will be created when necessary following the standard process.

That guidelines for place subdivisions are established

Geographical place names, as subdivisions, will be applied as in LCSH. The guidelines created in Phase One for creating names of places⁴ apply.

That scope notes in Māori are provided to facilitate access for speakers of te reo Māori, the Māori language, where resources permit

Time did not permit Pu Ki Te Tauria to address this task. It is recommended that it be addressed at a later stage.

That an authoritative list of waka tīpuna, iwi and hapū names is developed

Pu Ki Te Tauria determined that the development of such a list was a huge undertaking. Time restraints did not permit the group to develop this list in any comprehensive form. During this Phase, the NLNZ updated the waka, iwi and hapū list from KUPU and Pu Ki Te Tauria agreed that this revised KUPU list would satisfy the requirements to identify waka, iwi and hapū names. This revised list is based on the KUPU list that had been developed with input from tangata whenua, Māori language experts and historians, and Te Taura Whiri i te Reo Māori. A formal request to the NLNZ for permission to use the headings must be made before any further development on the iwi/hapu list can take place. Some work will be required to make these headings compatible with the MSH list. It would not be necessary to incorporate the NOTES field from KUPU into the MSH list – the information in this field is not relevant to general library use.

That mechanisms are developed for making the MSH list available to potential users

The Working Party and Pu Ki Te Tauria agree that the MSH list must be in a format that can be made available via the Internet. This will enable the MSH list to be accessible to most libraries throughout New Zealand. Initial discussion with NLNZ has been held regarding the possibility of making the MSH list available via its online database host, Te Puna. The NLNZ is open to continue negotiation once technical specifications, maintenance requirements and ownership details of the MSH list are known. The NLNZ raised the issue that they would also require that the MSH list meet certain Māori language standards. Further consideration on this issue must be addressed. Māori language organisations, academics, teachers, and educationalists have been contacted to provide comment and/or support for MSH.

⁴ ibid ; Names of places p.9

To increase the possibility of making the list available via the Internet, the Working Party and Pu Ki Te Taurira recommend that the MSH list be built using MultiTes thesaurus development software (for product detail and purchasing information see Appendix One MultiTes). NLNZ currently use this software and as such has developed processes for the display of macrons and transferal of data to the Te Puna platform.

That a system be considered for the ongoing growth and maintenance of the MSH list, under the auspices of a monitoring group

Due to time constraints, the Working Party and Pu Ki Te Taurira were not able to explore this issue in any depth. Brief discussion led Pu Ki Te Taurira to the consensus that a governing body is required that has the responsibility for all aspects relating to MSH. LIANZA and TRW are envisaged as being responsible for identifying board members and establishing this body. The Working Party and Pu Ki Te Taurira recommend that this body consist of members with knowledge of and ability in te reo Māori and tikanga, representatives from the Bic-Sig, Cat-Sig, LIANZA and TRW. It is recommended that the role and function of this board be explored in detail in the next Phase.

That mechanisms are developed for:

- **adding terms to the MSH list**
The standard process to create MSH also details how MSH are added. Instruction and training for data entry of terms into the MultiTes software will be required
- **deciding between synonyms where a preferred term cannot readily be established**
Guidelines have been established⁵
- **creating a greater level of detail for topics, where required**
The process for creating MSH allows for greater detail of a topic to be incorporated into the MSH list where required.

That quality control processes are developed for correcting or modifying entries in the MSH list

This task was deemed to be a role of the governing body. Time did not permit the Working Party and Pu Ki Te Taurira to explore this in depth. It is recommended that this task is addressed at the same time as the role and function of the governing board is developed.

As part of the standard process and to ensure quality of the Māori language terms, a list of Māori language resources and sources for geographical place names in Māori (in-print or in electronic format) has been compiled.⁶ A code will accompany each term within the MSH list that identifies the resource/s that verifies the term and warrants its inclusion and application. This practice follows the method used by Te Taura Whiri i te Reo Māori in the compilation of their work *Te Matatiki : contemporary Maori words* (Auckland, 1996). The list of resources and codes will increase, as more resources become available.

That an application is made to the Library of Congress for MSH to be added to the USMARC Code List for Relators, Sources, Description Conventions

When the first edition of the MSH list is ready for application and a name for the MSH list has been determined, application can then be made to the Library of Congress. It is recommended that this task be addressed once the list is available and named.

That the future and usefulness of the MaSHreo list-serv is considered

The Working Party did not utilise this resource during this Phase. However, it is still considered to be an effective and efficient format in which to disseminate information and receive comment from the New Zealand library and information community, and any person interested in this Project. It is recommended that the list remain and envisaged that it will be one of the main methods to communicate to other interested individuals and organisations.

⁵ ibid ; Choice of term p. 3

⁶ ibid ; Appendix Three - Resources & Codes

That an appendix outlining the system implications of MSH is developed.

Until the technical specifications of the final MSH product are known, little would be achieved in exploring systems issues within this Phase. These issues must be addressed, if still deemed necessary, at a later stage.

RECOMMENDATIONS TO LIANZA AND TRW

The Working Party and Pu Ki Te Taurira recommends that LIANZA and TRW support the following developments.

1. The Māori Subject Headings Project continues into its third phase.
2. That LIANZA and TRW establish a Project Steering Committee who oversee, manage and resource the project.
3. LIANZA and TRW contract 1 fulltime person (40 hours per week) initially for one month, to continue developing MSH (following the guidelines and process) and to compile the MSH list (data entry). This person must have competencies in using computers and data entry; some skill in te reo Māori; excellent communication skills; work experience within libraries – cataloguing experience a bonus; knowledge of the the application and use of subject headings. After this time the progress of the MSH list should be evaluated to determine the likely expected time to complete the first version of the MSH list. This person will need access to general office resources, a computer with internet and e-mail capabilities, and, Māori language resources. It is further recommended that this person concentrate specifically on developing topical MSH in the following areas:
 - Education
 - Health
 - Tikanga / Māori culture
 - Social Issues
 - Treaty of Waitangi
4. LIANZA and TRW purchase a copy of MultiTes thesaurus development software on which to build the MSH list. That this software (along with training and instruction for data entry) is made available to the contractor mentioned above. See Appendix One for product and purchasing information.
5. LIANZA and TRW commission a board to govern MSH and the list as determined by the Phase Three Working Party (see recommendation 2, following). That this board is made up of members with knowledge of and ability in te reo Māori and tikanga, representatives from the Bic-Sig, Cat-Sig, LIANZA and TRW.
6. LIANZA and TRW begin to consider future production costs, and investigate funding options.

RECOMMENDATIONS TO THE WORKING PARTY PHASE THREE

1. Assist in the development and creation of MSH specifically concentrating on:
 - waka, iwi and hapū names

- continuing the work on subdivisions – all types
 - qualifiers; and
 - assisting the contractor in developing MSH in the subject areas listed above
2. Develop the purpose, role and objectives for a board that has overall responsibility for the maintenance, growth, and quality control of MSH.
 3. Investigate the need for scope notes in Māori
 4. Determine a formal name for the MSH list.
 5. Continue negotiations with NLNZ in respect to using Te Puna as a possible database host for the MSH list noting risks, issues, technical specifications and costs as they arise.
 6. Apply to LCSH for MSH to be added to the USMARC Code List once the MSH list has a name and the first version of the MSH list exists.
 7. Retain the MaSHreo list-serv and use where necessary.
 8. Negotiate with and formally request permission from NLNZ to use the hapū, iwi and waka headings from the revised KUPU list.
 9. Detail any system implications of the MSH list when known.

WORKING PARTY MEMBERS

Mihi Harris	Project Manager
Glenn Taitoko	Te Puni Kōkiri Library, Te Rōpū Whakahau
Chris Todd	Open Polytechnic of New Zealand, NLNZ, Cat SIG

Contributors to Working Party

Maria Heenan	National Library of New Zealand
Robyn East	National Library of New Zealand, Cat SIG, Bic SIG

Pu Ki Te Taurira Members

Jenny Bryan	Auckland University Library
Mereana Coleman	Te Whare Wananga O Awanuiarangi
Eynon Delamere	Waitakere City Library
Rangiiria Hedley	National Library of New Zealand, Hamilton Service Centre
Te Taka Keegan	University of Waikato
Peggy McConnell	Early Childhood Development Library
Meri Mygind	National Library of New Zealand, Wellington

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MultiTes

Thesaurus development software by Multisystems

Contact: Multisystems
PO Box 833205
Miami, FL 33283

Phone: (305) 274 3684
Fax: (305) 274 2458
Email: MultiTes@aol.com
Website: <http://www.multites.com>

Options (all prices in US\$):

Single-user License: \$295.00 plus S/H
Multi-user LAN License: enquire
Site License (unlimited users per location): enquire
Institutional License (unlimited users worldwide): enquire
Educational/Government Agencies: enquire

Shipping and handling:

International: \$65.00

System Requirements:

IBM-PC or compatible (486 or above recommended)
16 MB of RAM (32 recommended)
2 MB of disk space for system files
15 MB of disk space for each 50,000 terms
Windows 95/98, Windows NT, Windows ME, or Windows 2000

Subdivisions – Form

Note: These subdivisions were created following the standard process outlined. This is an initial list and it is expected that further form subdivisions will be created as the MSH list develops.

Ataata-rongo

- SN A form subdivision. Audio-visual aids (LCSH)
- UF Audio-visual aids

Haereere

- SN A form subdivision. Description and travel (LCSH)
- UF Description and travel

Haurongo

- SN Biography (LCSH)
- UF Biography
Biographies
Biographical
- SA subdivision Haurongo

Hautaka

- SN Periodicals (LCSH)
- UF Periodicals
- SA subdivision Hautaka

Kōrero nehe

- SN History (LCSH)
- UF History
Histories
- SA subdivision History

Kōrero pono mā ngā tamariki

- SN A form subdivision. Juvenile literature (LCSH)
- UF Juvenile literature

Kuputohu

- SN Indexes (LCSH)
- UF Indexes
Index
- SA subdivision Kuputohu

Mahere whenua

- SN Maps (LCSH). Use only for maps of land and land features only.
- UF Maps
- SA subdivision Mahere whenua

Ngā whaiara

- SN Directories (LCSH)
- UF Directories
Directory
- SA subdivision Ngā whaiara

Pakiwaitara

- SN Fiction (LCSH)
- UF Fiction
- SA subdivision Pakiwaitara

Pakiwaitara mā ngā tamariki

- SN A form subdivision. Juvenile fiction (LCSH)
- UF Juvenile fiction

Pānui whakahua

- SN Posters (LCSH)
- UF Posters
- SA subdivision Pānui whakahua

Papa mātauranga whānui

- SN Encyclopedias (LCSH)
- UF Encyclopedias
Encyclopedia
- SA subdivision Papa mātauranga whānui

Papa kupu

- SN A form subdivision. Dictionaries (LCSH)
- UF Dictionaries
Dictionary

Rārangi pukapuka

- SN Bibliography (LCSH)
- UF Bibliography
Bibliographies
- SA subdivision Rārangi pukapuka

Whai mātauranga me whakaakoranga

- SN A form subdivision. Study and teaching (LCSH)
- UF Study and teaching

Subdivisions – Time/Period

Note: These subdivisions were created following the standard process outlined. This is an initial list and it is expected that further form subdivisions will be created as the MSH list develops. This list was developed by Pu Ki Te Tauria and on consultation with Wharehuia Milroy, Timoti Karetu and Te Tumata Kuru O'Connell.

Te Kū

- SN A period subdivision for the time prior to 1000 AD. Covers the periods before and up to the creation of the heavens, the gods and their domains, the demi-gods, the creation of earth, the creation of man, the event of navigation and early exploration.
- UF Ancient history to 1000 AD
- NT Hawaiki nui
Hawaiki pamamao
Hawaiki roa
Te Ao Kohatu
Te Kore
Te Pahutanga o te Ao
Te Pakanga o ngā Atua
Te Pō
Te Wehenga

Te Rū

- SN A period subdivision for the time from 1000 to 1819. Covers the period of migration of the ancestral waka, Māori settlement of Aotearoa, the 19th century European explorers and navigators (Tasman, Cook, du Surville etc.), whaling and sealing, and, the arrival of missionaries.
- NT Kaipuke Amiowhenua
Patu Tohoroa
Tangata Whenua
Te Hekenga Nui
Te Rongopai

Te Pū

- SN A period subdivision for the time 1820 to 1913. Covers the period of the Musket Wars, colonisation and settler acquisition of Māori land, the Treaty of Waitangi, land alienation, and, the Māori King Movement.
- NT Hokohoko Whenua
Kingitanga
Muru Whenua
Raupatu
Te Tiriti o Waitangi

Te Whurū

SN A period subdivision for the period 1914 to 1945. Covers the period of World War I, European disease and its effects on the māori population, the influenza epidemic, World War II, and the beginning of the subsistence of Māori cultural values.

NT Te Matemate a Māori
Te Mauiuitanga o Taiwi
Te Pakanga Tuarua o te AO
Te Pakanga Tuatahi
Te Takahitanga o ngā Tikanga Māori

Te Hū

SN A period subdivision for the time 1945 onwards. Covers the period of the start of Māori urban drift, the modern and technological world, and, the new millennium.

NT Rua Mano
Te Hūnuku Nui