

# *The Development of Descriptive Standards in Canada: A Progress Report*

by **KENT M. HAWORTH**

The Planning Committee on Descriptive Standards (PCDS) was formally established by the Bureau of Canadian Archivists (BCA) in the autumn of 1986, and held its first meeting early in 1987, just over a year after the publication of *Toward Descriptive Standards*.<sup>1</sup> *Toward Descriptive Standards* made thirty-five recommendations;<sup>2</sup> in its mandate statement and terms of reference, approved by the BCA, the PCDS is committed to implementing those recommendations, (See **Appendix B**.) The majority of these recommendations have been acted upon, or are in the process of being done so, by the PCDS.

The authors of *Toward Descriptive Standards* note in the introduction to their report that the development of descriptive standards and rules "is one of the most complex areas of archival work, and it would be impossible, not to mention foolhardy, to attempt to develop standards in a year."<sup>3</sup> The PCDS has been at work now for five years, and in a recent report to the Bureau estimated that it expected to fulfil its mandate in the financial year 1994-95. All those involved in the work of the PCDS are waiting patiently, perhaps impatiently, for the completion of this important project. The process of development of archival descriptive standards and rules for Canadian archivists is distinguished from standards development in other countries by the consultative process which has been established for the review and approval of the rules. The definition of this process has its origins in Recommendations 31 and 32 of *Toward Descriptive Standards*:

Recommendation 31:

*We recommend that the members of the committees whose appointment we have urged on the Bureau of Canadian Archivists be chosen in accordance with the following guidelines: a) committee members should be known to have expertise in and practical working knowledge of the issue concerned; b) each committee should have at least one representative from the Public Archives of Canada; and c) each committee should, where possible, be regionally based to minimize the high costs of committee meetings.*

Recommendation 32:

*We recommend that, after a suitable period of discussion in the Canadian*

*archival community, proposed standards be formally approved and adopted by the ACA and AAQ, in conjunction, where appropriate, with the relevant national or international bodies which ratify particular standards.*

The PCDS has followed the recommended guidelines for the appointment of working group members, and the consultative process which the PCDS has adopted attempts to engage as many archivists as possible in the development of *Rules for Archival Description (RAD)*. While this has meant that the publication of the rules will be slower than some might wish, there is no doubt that the resulting product has benefited from the dedication and diligence of working group members, and the participation and contributions of Canadian archivists who have taken the time to respond to draft rules.<sup>4</sup>

The following review of the recommendations, grouped under eight categories, serves as a progress report on the work of the PCDS to date. In addition, this review also provides an opportunity to examine some issues that are raised as a result of the efforts of the PCDS to satisfy those recommendations.

### ***Principles and Concepts***

#### Recommendation 1:

*We recommend that, as a priority, Canadian archivists describe and index holdings at the level of fonds, regardless of the form or medium of the records.*

#### Recommendation 3:

*We recommend that Canadian archivists formally recognize five levels of the arrangement of archives: repository, fonds, series, filing unit, and item.*

#### Recommendation 4:

*We recommend that Canadian archivists recognize seven levels of description: inter-institutional, repository, thematic group, fonds, series, filing unit, and item.*

#### Recommendation 5:

*We recommend that the organization of descriptive work proceed from the more general to the more specific levels of description.*

#### Recommendation 6:

*We recommend that flexible standards incorporating the concept of level of detail of description be developed whenever possible.*

Recommendation 1 was endorsed by the fonds d'archives working group and the PCDS, and incorporated as a fundamental descriptive principle in *Rules for Archival Description*. Recommendations 3 to 6 were also accepted as axioms governing the description of archival materials, and form the basis for the drafting of rules by the various media working groups.

#### Recommendation 2:

*We recommend that the Bureau of Canadian Archivists ask the International Congress [sic] on Archives and the International Federation of Library Associa-*

*tions and Institutions jointly to develop and seek approval for international standards for the description of fonds d'archives.*

The ICA's Ad Hoc Commission on Descriptive Standards has undertaken the development of draft rules for the description of archives based on a "Statement of Principles Regarding Archival Description" that has been distributed to the international community for review and comment.<sup>5</sup> This initiative by the ICA is one of the most significant projects which it has embarked upon, and it will be reviewed at the forthcoming International Congress on Archives in Montreal. Canada is represented on the Ad Hoc Commission, and it is essential that Canadian archivists monitor closely the development of rules for archival description at the international level.

### **General Descriptive Standards**

#### Recommendation 7:

*We recommend that all types of finding aids regularly produced by Canadian archival repositories be defined in standards which would give a name to the type of finding aid in question, state its purpose, characterize its contents, and establish a format for its presentation.*

The PCDS does not consider this recommendation as part of its mandate, since finding aids are the products of archival descriptions, varying in type and serving specific purposes; they may contain descriptions based on *RAD*. *RAD* is a data content standard, and therefore does not address the issue of the format for the presentation of archival descriptions. Finding aids are data structure standards; accordingly, the question of standardization of finding aids is an institutional and inter-institutional concern.<sup>6</sup>

Recommendation 7 taken together with recommendations 27 and 28 concern matters that must be considered independently by the Canadian Council of Archives (CCA), representing archival institutions in Canada, or jointly with the BCA. The CCA may wish to have its Standards Committee prepare a compendium of examples that demonstrate different formats for finding aids based on *RAD*, whether the system is manual or automated, and regardless of the different types of hardware or software.<sup>7</sup> Agreement on a standard for types of finding aids and the formats for the exchange of information about holdings is an essential first step toward the realization of recommendation 27. The responses received from the archival community on the draft chapters circulated for comment clearly indicate that the profession wants and needs direction at the national level regarding the standardization of finding aid formats.<sup>8</sup>

#### Recommendation 8:

*We recommend that the Bureau of Canadian Archivists strike a special committee to study the data element dictionary produced during the work of the National Information Systems Task Force of the Society of American Archivists and the data standard for computerized archival description developed by the Methods of Listing Working Party of the Society of Archivists in the United Kingdom to determine their usefulness and applicability to the overall development of descriptive standards for Canadian archives.*

The glossary being developed for *RAD*, as the rules are finalized, goes some way toward accomplishing part of this recommendation. As an aspect of the ongoing maintenance and revision process, the CCA (together with the BCA) should carefully monitor the use of terminology, and consider the development and maintenance of a data element dictionary for Canadian archives and archivists. In addition, the BCA might consider limiting the extent of this recommendation to focus on form of material terminology and technical terms. Because *RAD* limits the terms in its glossary to include only those used in the rules, there would be some benefit in developing a dictionary of forms of material and technical terminology.<sup>9</sup>

***Specific Descriptive Standards:***

Recommendation 9:

*We recommend that government records, corporate records, and manuscripts be considered as one particular type of format for the purposes of developing descriptive standards.*

Recommendation 10:

*We recommend that the Bureau of Canadian Archivists appoint a committee to develop descriptive standards for textual archives at all levels of description.*

Recommendation 11:

*We recommend that this committee use Steven Hensen's Archives, Personal Papers, and Manuscripts, with modifications as appear necessary, as the basis for the development of rules for the summary description of textual archives at the fonds level.*

These three recommendations have been either adopted or realized by the PCDS. The rules drafted by the Textual Records working group were informed by a broader base of literature relating to the description of archives and included Michael Cook and Margaret Procter's *Manual of Archival Description*, Ann Pederson's *Keeping Archives*, Carol Couture and Jean-Yves Rousseau's *The Life of a Document*, and the ICA's *Dictionary of Archival Terminology*. As a result, the rules represent a blend of European and American approaches to archival description. For example, the PCDS recognized that the technique of multilevel description is the most appropriate technique for the accurate representation of a fonds and its parts, and accordingly drafted a chapter specifically devoted to its application (Chapter 11). This is only one of many other attributes distinguishing *RAD* from *APPM*, and is indicative of the Planning Committee's conviction that *RAD* ought to be developed on the foundations of archival principle rather than on the exigencies or capabilities of existing descriptive systems, whether manual or automated. The draft of Chapter 3, "Rules for Textual Records," was reviewed by the PCDS in the light of comments received from the community; the final version will be published in French and English and made available to the archival community in September 1992.

Recommendation 12:

*We recommend that the Bureau of Canadian Archivists appoint a committee to develop descriptive standards for photographs and collections of photographic*

*materials using Elizabeth Betz's Graphic Materials, with modifications as appear necessary, as the basis for such standards.*

Recommendation 13:

*We recommend that the Bureau of Canadian Archivists appoint a committee to develop descriptive standards for paintings, prints, drawings and other works of art using Elizabeth Betz's Graphic Materials, with modifications as appear necessary, as the basis for such standards.*

The PCDS has completed its review of draft rules for Chapter 4 of *RAD*, prepared by the Graphic Materials working group. As with Chapter 3, the final version will be published in French and English and made available to the archival community in September 1992.

Recommendation 14:

*We recommend that AACR2 (Chapter 3) and Cartographic Materials: a Manual of Interpretation for AACR2 be the basis for description of cartographic materials.*

Recommendation 15:

*We recommend that descriptive standards for architectural archives be developed separately from those for cartographic materials.*

Recommendation 16:

*We recommend that the Bureau of Canadian Archivists appoint a committee to work closely with the Architectural Drawings Advisory Group to develop standards for the description of architectural archives, and for architectural drawings in particular.*

Recommendation 17:

*We recommend that the Bureau of Canadian Archivists appoint a committee to examine and evaluate Wendy White-Hensen's Archival Moving Image Materials: A Cataloging Manual as a basis for descriptive standards for moving image material, with modifications as appear necessary.*

Recommendation 18:

*We recommend that the Bureau of Canadian Archivists appoint a committee to examine existing standards for the description of sound recordings and develop standards which meet the special requirements of the variety of sound recordings held in archival repositories, and co-ordinate the committee's work with efforts in the same direction as the Association for the Study of Canadian Radio and Television.*

Recommendation 19:

*We recommend that the Bureau of Canadian Archivists appoint a committee to develop standards for machine-readable archives using Chapter 9 of AACR2 and Sue Dodd's Cataloging Machine-Readable Data Files, with modifications as appear necessary, as a basis for such standards.*

**Recommendation 20:**

*We recommend that this committee take steps to ensure that it is represented on the IFLA working group which is developing an ISBD for machine-readable data files.*

The PCDS reviewed its priorities for the completion of the rules for the remaining media chapters in Part I and established the following order of priority commencing in the fiscal year 1992-93 and concluding in 1994-95:

1. Sound recordings
2. Cartographic records
3. Computer files
4. Moving Images
5. Architectural records
6. Microforms

Working groups for the first three media will be meeting in May 1992, when rules will begin to be drafted and then circulated to the community for comment. The PCDS has set a target date of 30 September 1993 for the completion of a draft of all these chapters, in order that the first edition of *RAD* be completed by 31 March 1994.

***Non-Subject Access Points*****Recommendation 21:**

*We recommend that Canadian archivists make use of Canadiana Authorities and/or Library of Congress Name Authorities whenever possible in building their own name authority files.*

**Recommendation 22:**

*We recommend that the rules in AACR2 (Chapters 22-24) be used where appropriate for the formation of personal, corporate, and geographical names where no existing authority listing is available.*

**Recommendation 23:**

*We recommend that the Bureau of Canadian Archivists prepare a manual on name authorities discussing the reasons behind them, and explaining the AACR2 rules for names and how to use the most significant existing authorities.*

The PCDS published Louise Gagnon-Arguin's *An Introduction to Authority Control for Archivists* (Occasional Paper No. 2) in 1989, and Elizabeth Black's *Authority Control, A Manual for Archivists* (Occasional Paper No. 3) in 1991. These two occasional papers introduce archivists to authority work and provide guidance for the development of authority files.

Part II of *RAD*, being chapters 21, 22, 23, 24 and 26, providing rules for the choice and form of access points for personal, geographic and corporate names, together with rules on the provision of references to them, will be published for distribution to the archival community in the autumn of 1992.

### ***Subject Indexing***

Recommendation 24:

*We recommend that the Social Sciences and Humanities Research Council of Canada fund a research study to investigate the issues and problems in indexing archival material as related to the needs of archivists and the users of archives.*

Recommendation 25:

*We recommend that archival institutions already committed to indexing of their holdings use existing lists of subject headings deemed most appropriate for their needs.*

Recommendation 26:

*We recommend that institutions which index their holdings prepare cumulative indexes based on consistent procedures and existing subject headings rather than separate indexes for each fonds.*

One of the first projects undertaken by the PCDS was the establishment of a Subject Indexing working group. This working group has now completed a draft of its report, which will be published as Occasional Paper 4.

Retrieval of information through non-subject access points is a highly complex undertaking, as several provinces and institutions that have developed subject headings thesauri can attest to. The CCA, through its Standards Committee, should monitor the use and maintenance of these Canadian efforts, particularly in the context of future initiatives to develop inter-institutional networks of archival information exchange.

### ***Information Exchange***

Recommendation 27:

*We recommend that the Bureau of Canadian Archivists appoint a committee to undertake the necessary research to recommend mechanisms for inter-institutional exchange of archival information.*

Recommendation 28:

*We recommend that a committee be appointed by the Bureau of Canadian Archivists, working in close co-operation with the National Library of Canada and the Canadian Committee on MARC (CCM), to examine the US/MARC Archives and Manuscripts Control format and make recommendations about its adoption or adaptation in Canada.*

*Toward Descriptive Standards* was published before the establishment of the CCA. The CCA, representing archival institutions in Canada, now seems the most appropriate body to coordinate endeavours such as those proposed in this recommendation. The interests of the Canadian archival community have been represented at meetings of the Canadian Committee on MARC (CCM) and the PCDS is keeping abreast of developments and changes to the MARC format. A sub-committee of the CCA's Standards Committee has been established to provide advice on the use of the MARC format, thus

ensuring that the interests of both Canadian archives and archivists will be represented by our informed participation in this important forum. In addition the Bureau of Canadian Archivists is recognized by the Canadian Committee on Cataloguing (CCC) as a resource member to the CCC and a member of the PCDS is invited to attend its meetings which are held to review proposals for rule revisions to *AACR2R*. The active and welcomed participation of the archival community on these committees augurs well for future cooperative ventures between the bibliographic and archival communities and other information science professionals responsible for making available information resources available for use.

As increasing numbers of archival descriptions are produced using *RAD*, the issue of establishing an information exchange network will be raised. Already, British Columbia is developing a provincial network.<sup>10</sup> Should there be a national information exchange network of archival holdings? Should provincial networks be integrated by some means into a national network? Should a national authority file, similar to *Canadiana Authorities* maintained by the National Library, be developed for Canadian archives? These questions and many other issues need to be addressed by Canadian archives wishing to explore the feasibility of an information exchange network at the local, provincial or national level.

### ***Development and Adoption***

#### Recommendation 29:

*We recommend that the Bureau of Canadian Archivists seek national sources of funding to meet the expenses involved in the development, implementation, and maintenance of descriptive standards for Canadian archival material.*

#### Recommendation 30:

*We recommend that the Public Archives of Canada establish an office to support the development, implementation, and maintenance of national standards for archival description.*

Recommendation 21 resulted in the establishment of the PCDS; with the inauguration of the CCA in 1986, moreover, resources were made available to realize some of the recommendations of *Toward Descriptive Standards*. The National Archives, and several other archives, have established an Office of Descriptive Standards or a comparable post directly responsible for descriptive standards implementation, in order to support the implementation, application and maintenance of descriptive standards and rules within archival institutions.

### ***Implementation and Maintenance***

#### Recommendation 33:

*We recommend that the Public Archives of Canada co-ordinate the publication, translation, distribution/dissemination, maintenance, updating, and revision of adopted standards.*



**Recommendation 34:**

*We recommend that education in the use of ratified standards be undertaken by the national and regional associations by means of workshops in all parts of the country.*

**Recommendation 35:**

*We recommend that curricula of formal archival education programs include extensive reference to ratified standards and how to use them.*

The PCDS has assumed the responsibility for the drafting and publication of adopted rules, with resources provided by the CCA. However, the issues of ongoing maintenance, updating and revision of *RAD* become more pressing as the rules are implemented in institutions and applied by archivists. It is essential that the BCA collaborate with the CCA to find the most appropriate mechanism to monitor the use of *RAD*, with a view to its revision over the next ten years.

There is an urgent need for education in archival arrangement and description, and in the use of *RAD*. The digest of comments from the archival community is positive proof of the need for a coordinated, systematic education programme for archivists responsible for description and the use of the rules. Such training is essential if the rules are to be applied in a uniform and consistent manner. Institutions, as much as the professional associations, have a responsibility to invest in the education of their staff in order to ensure that the rules are implemented consistently, in the most effective and efficient manner possible. Accordingly, the PCDS has urged the BCA and its constituent associations, the ACA and AAQ, to commit financial resources to descriptive standards education. PCDS members, at the invitation of regional associations and provincial councils, have voluntarily given of their time to present introductory workshops on the structure and application of *Rules for Archival Description*. While archivists in every province have had an opportunity to attend these introductory workshops, the time is fast approaching when the archival community will require more in-depth instruction as to the application of the rules.

The BCA, together with the CCA, must find the resources to establish the appropriate structures in which to teach the rules. Increasing numbers of archivists are seeking the advice and assistance of PCDS members in the application of the rules. At the same time, the PCDS has stressed that its focus must remain on the completion of the rules. Structures and mechanisms will have to be put in place to ensure that the questions archivists ask about the implementation and application of *RAD* are answered. In addition, the BCA should also communicate with educational institutions offering pre-appointment archival education and training in order to ensure that the subject of descriptive standards is included in the curriculum.

This report on the work accomplished by the PCDS to date, together with its plans for the completion of its mandate, raises issues which will have to be addressed by both the profession and archival institutions. Standards development, implementation and maintenance are an on-going process, like the organic nature of a fonds d'archives. It is an organic process, evolving, changing and adapting to new circumstances over time. This is as it should be, if standards and rules for the description of archival materials are to be accepted and successfully applied.

## Appendix A

### Recommendation 1:

*We recommend that, as a priority, Canadian archivists describe and index holdings at the level of fonds, regardless of the form or medium of the records.*

### Recommendation 2:

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*We recommend that curricula of formal archival education programs include extensive reference to ratified standards and how to use them.*

## **Appendix B**

### **BUREAU OF CANADIAN ARCHIVISTS Planning Committee on Descriptive Standards *Mandate Statement and Terms of Reference***

#### ***Mandate Statement***

The Planning committee on Descriptive Standards (PCDS) is a Committee of the Bureau of Canadian Archivists (BCA). The PCDS will implement the recommendations of the Working Group on Descriptive Standards as published in *Toward Descriptive Standards/Les normes de description en archivistique: une nécessité*, (Ottawa, Bureau of Canadian Archivists, December 1985/ Bureau canadien des archivistes, Janvier 1986); continue the development of archival descriptive standards as required by the Canadian archival community; publish and disseminate archival descriptive standards as well as encourage their use through training programs and publications; and assist in the establishment of mechanisms to maintain and revise the archival descriptive standards as required. The BCA has delegated to the PCDS approval of the rules the PCDS develops and of its publications. The BCA requires a copy of the final approved publication (see II. C. 4.) for information, prior to final production. The PCDS will be dissolved as soon as the tasks outlined in this Mandate Statement have been completed.

#### ***Terms of Reference***

##### ***A. Membership***

1. The PCDS shall consist of six members, three appointed by the Association of Canadian Archivists, and three appointed by the Association des archivistes du Québec. Two Observers, one from the BCA and one from the National Archives of Canada, normally its Senior Descriptive Standards Officer, shall be invited to attend its meetings. The Observer from the BCA shall inform the other members of the BCA of all matters related to the activities of the PCDS. The Descriptive Standards Project Coordinator shall function as its Secretary.

##### ***B. Work Plan, Budget and Other Administrative Matters***

1. The PCDS shall prepare and maintain a Long Range Plan (usually five years) that will identify projects and outline the planned activities over the range of the Plan.
2. The PCDS shall prepare and maintain a yearly Work Plan that will identify projects, outline the planned activities of the year, and project them for the following year.
3. The PCDS shall prepare and maintain a yearly Budget that will lay out the costs for the planned projects and activities of the year and project the costs for the following year.
4. The PCDS shall direct the work of the staff of the Descriptive Standards Project Office.

*C. Development of Archival Descriptive Standards and Related Subject Matters*

1. The PCDS shall identify and carry out specific projects needed in the development of archival descriptive standards and shall also identify and conduct projects for related subject matters needed for the clarification, interpretation or application of such standards, e.g., the examination of subject indexing, choice of access points, the application of the authority concept and authority files to archival descriptive processes.
2. The PCDS shall name, where appropriate or required, working groups, committees, contractors, etc. to carry out specific projects to develop archival descriptive standards and examine and report on related subject matters, and shall direct and manage the contracts, committees or working groups.
3. The PCDS shall examine, correct and approve draft reports/manuals, etc., produced by the working groups, committees or contractors.
4. The PCDS shall approve the final results of its work and the work of its working groups, committees, contractors, etc., and decide on what should be published and how it should be published, e.g., in a newsletter, as an occasional paper, as a monograph.

*D. The Encouragement of the Use of Archival Descriptive Standards and their Maintenance*

1. The PCDS shall publish and distribute its developed archival descriptive standards and any related subject matter it may produce, of the nature described under II.C.1.
2. On request, the PCDS will review, for the purposes of endorsement, any interpretive manuals, example books, or like material, initiated by the profession or institutions.
3. The PCDS shall circulate relevant working documents to interested parties and/or specialists for commentary.
4. Members of the PCDS or designated representatives may participate in special conferences and/or symposia specifically related to the development of descriptive standards.
5. Members of the PCDS or designated representatives may hold sessions and/or report on its work at annual meetings of archival and related associations and councils.
6. Members of the PCDS or their delegates may represent the BCA on other national and international committees related to descriptive standards, e.g. the Canadian Committee on MARC (CCM), the Canadian Committee on Cataloguing (CCC), ISO/TC46. While serving on these committees the PCDS representative will comment on decisions affecting archival descriptive practice.
7. The PCDS shall assist in the establishment of mechanisms to maintain and revise current standards as required.

*E. Reporting*

1. The PCDS shall select a chairperson from among its members.
2. The PCDS accounts for its expenditures to the Canadian Council of Archives (CCA), its funding agency, by reporting on PCDS activities and expenditures.

### Notes

- 1 *Toward Descriptive Standards, Report and Recommendations of the Canadian Working Group on Archival Descriptive Standards* (Ottawa, 1985). For an account of the events leading to the establishment of the committee, see Jean Dryden and Kent Haworth, *Developing Descriptive Standards: A Call to Action* (Ottawa, 1987), pp. 6-10.
- 2 The recommendations are reproduced in order as **Appendix A**.
- 3 *Toward Descriptive Standards*, p. 5.
- 4 By September 1992 the PCDS expects to publish Chapters 3 and 4 of Part I of *Rules for Archival Description* and most of Part II: Chapters 21, 22, 23, 24 and 26. These chapters are in addition to the first two chapters and appendices that were published in 1990.
- 5 See "Statement of Principles Regarding Archival Description," First version revised (Ottawa, 1992), and "ISAD(G): General International Standard Archival Description" adopted by the Ad Hoc Commission on Descriptive Standards, Madrid, 21-24 January 1992 (Ottawa, 1992). Both documents are published elsewhere in this issue of *Archivaria*.
- 6 *Report of the Working Group on Standards for Archival Description, American Archivist* 52, no. 4 (Fall 1989), p. 454.
- 7 The Canadian Council of Archives has supported a request to investigate a prototype hypertext application of *RAD*, which potentially could interact with an interpretive manual, a compendium of examples, and data input in order to improve the economics and efficiencies of descriptive work. See "Hyper-RAD: un software canadese per l'automazione degli archivi," *Archivi & Computer*, Anno I, Fascicolo 2/1991, p. 187, an article by Wendy Duff and Elaine G. Toms, published elsewhere in this issue of *Archivaria*.
- 8 The Planning Committee has deposited the compendium of comments prepared for each Working Group Report with the Canadian Centre for Information and Documentation on Archives, National Archives of Canada.
- 9 See the second recommendation that appears in the Introduction to the Report of the Textual Records Working Group to the Bureau of Canadian Archivists Planning Committee on Descriptive Standards, November 1990.
- 10 Blair Taylor, "Archival Holdings in B.C. Project: Progress Report," *AABC Newsletter* 2, no. 1 (Winter 1992), pp. 8-9.