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Development of a Spanish subject headings list

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Abstract:

During the second half of the twenty century, Mexican libraries began to compile their subject lists based in translations from the Library of Congress Subject Headings (LCSH). Nevertheless, their work was not only literal translations of terms or expressions, but also an interpretation of these words to fit the local language features. As a result of the authority work, the National Library of Mexico published in 1978 its "Subject Headings List", which was adopted by the majority of Mexican libraries and used for their subject cataloging. Although the authority record files continued being updated, there was not other printed edition. Additionally, the General Direction for Libraries of the National Autonomous of Mexico, that carry out centralized catalogin for more than one hundred of branch libraries, has done translations of LCSH terms and at the present has compiled a file that includes 98 000 Spanish-English terms. These two sources would be the basis to create a Spanish Subject Headings List to support subject indexing in Mexican and Latin American libraries. The main objective of this paper is to discuss a proposal for the creation of that Spanish Subject Headings List.

Antecedents

Since the twenty century beginning, there were in Mexico some important efforts to create a Spanish subject headings list to be used in this country libraries. Likewise, in these endeavors, there was a strong influence of the U. S. Library of Congress and its Subject Headings List as it can be noticed in the following remarkable occurrences (Martínez-Arellano, 2002).

The first attempt to create such a list was carried out by Juana Manrique Lara, who in 1934 published her work "*Guía de encabezamientos de materia para los catálogos diccionarios*" [Subject headings list for dictionary catalogs]. As she states in her work, this list was grounded on the work of the Minnie Earle Sears, "List of subject headings for small libraries," the third edition of the List of subjects headings for use in dictionary catalogs published by ALA, and the work "Subject headings used in dictionary catalogs of the Library of Congress" (Manrique de Lara, 1934).

Other subject headings list produced in Mexico during the past century was the work of Ione Marion Kidder (1947), "*Encabezamientos de materia, castellano-inglés, inglés castellano*" [Subject Headings, Castilian-English, English-Castilian] published by the Benjamín Franklin Library. This list included the subject headings used in the National Library of Venezuela with their equivalent terms in English based on the "Subject Headings used in the dictionary catalog of the Library of Congress", 1943 edition.

Regarding to the practice dealing with LCSH use in Mexican Libraries, in 1957, Datshkovsky, at that time head of the Technical Department of the Mexico Library, the largest and most important public library in the country, pointed out the following:

> *To achieve our goal, we took as a base the 5th and last edition of the subject headings list used in the dictionary catalog of the Library of Congress in Washington because we considered it the most complete among the ones that had been published in English. Our work has not only been a literal translation of terms or expressions, even though in many cases isolated words unavoidably have to be translated, but also an interpretation of the words or expressions has been made to fit them to the readers' needs, although perhaps giving more importance to those of public libraries than specialized ones (p. 236).*

At the same time, the Organization of American States, through the Colon Commemorative Library of the Pan American Union [Unión Panamericana] (1957) undertook a project "to compile and to publish one of the indispensable manuals for library technical organization, an authorized Spanish subject headings list, with the purpose of easing the interpretation of material that technically is organized in libraries, using as basic works for the compilation of such a list other lists published in Spanish and English and subject headings lists used in important Latin American libraries" (p. 239). As a result of this project, the "*Lista de encabezamientos de material para bibliotecas*" [Subject Headings List for Libraries], compiled by Carmen Rovira and Jorge Aguayo, was published in 1967. This subject headings list was also based on the Library of Congress Subject Headings (LCSH), but local terms were incorporated. A second edition of this subject headings list was published in 1985 by the *Instituto Colombiano para el Fomento de la Educación Superior (ICFES)* [Colombian Institute to the Promotion of Higher Education] and a third one in 1998 by the Luis Angel Arango Library of the *Banco de la República de Colombia* [Bank of the Republic of Colombia].

The most outstanding effort at producing a subject headings list suitable to local needs has been done by the National Library of Mexico. As a result of the authority work accomplished at the National Library of Mexico, in 1967, this institution published its *"Lista de Encabezamientos de Materia"* [Subject Headings List] compiled by Gloria

Escamilla González. This work was based on LCSH translations; however, many local terms were also included. Since its appearance, this list was adopted by the majority of Mexican libraries for the subject cataloging of their collections. There was a second edition, published in 1978, that continues being used in the majority of Mexican libraries.

Another notable endeavor to create a tool to facilitate subject cataloging work in Mexican libraries is the authority subject catalog of the UNAM General Direction for Libraries. The Technical Processes Department of this institution, like many others in Mexican libraries, decided to translate subject headings taken from LCSH to create its own authority catalog. At the present time, this authority subject catalog includes nearly 100,000 subject headings. However, there is a lack of synonyms (see references) and hierarchical structures (broader, narrower, and related terms). (Garcia-López, 2000).

"*El Colegio de México*" [The College of Mexico] Library, the most important Social Sciences library in Latin America has also based its authority work on translations from LCSH list. At the present time, "El Colegio de Mexico" Library owns "5,000 authority records including authors, subjects, and Mexican local and municipal geographic names" (Quijano-Solís, Moreno-Jiménez & Figueroa-Servín 2000). "El Colegio de Mexico" Library, together with a university libraries group, has begun a project to create a subject authority catalog in Social Sciences.

National Library of Mexico "Subject Headings List"

As previously mentioned, the National Library of Mexico "Subject Headings List," compiled by Gloria Escamilla, which has been commonly called as the "Escamilla List", has been adopted and used by the majority of Mexican libraries for cataloging their collections.

The General Direction for Libraries of the National Autonomous of Mexico, that carry out centralized cataloging for more than one hundred of branch libraries, use translations of LCSH terms for subject cataloging; however, it also has made use of "Escamilla List." To facilitate its cataloging tasks, the Technical Processes Department of the UNAM General Direction for Libraries utilizes catalog records from the U. S. Library of Congress, and to make translations of LCSH terms included in those records uses its Spanish subject translation catalog. However, if there is not any Spanish translation in that catalog, several sources are recommended to make such translations, among them "Escamilla List." Likewise, if any record is found in the Library of Congress catalog, to make original cataloging the use of "Escamilla list" is firstly indicated (Martínez-Arellano and García López, 1991).

"*El Colegio de Mexico*" Library has also made use of the "Escamilla List" for doing its subject cataloging and authority work. In the cataloging policies webpage of "*El Colegio de México*" (2000) Library, it is mentioned that to settle subject headings for México y América Latina, "Escamilla List" will be firstly used. Additionally, in a frecuency analysis of sources used to validate subject authority records in "*El Colegio de México*" Library, Figueroa-Servín, Enciso, and Arriola-Navarrete (2001) mention that "Escamilla List" was used as a source in some cases.

Likewise, diverse technical processes departments in Mexican libraries have included in their cataloging policies the use of the "Escamilla List" to carry out their subject work. Some of these departments are those of the *Biblioteca del Congreso de la Union*" [Union Congress Library] (2000), the "*Universidad de Colima*" [Colima University] (2002), the *Universidad Iberamericana* [Ibero-American University] (1999), and the *Universidad de Aguascalientes* [Aguascalientes University](1999).

Additionally, "Escamilla Lista" has been used in diverse Latinamerican countries. In a work about classification and indexing trends in Cuba, Arenciba (1994) mentioned that "Escamilla List" was used as a source to develop Cuban subject headings lists. In a survey that included subject cataloging practices in Costa Rican libraries, Fortin (1996) found that "Escamilla List" was among the sources used to make subject cataloging work and to compile Costa Rican subject headings lists. Also, "Escamilla List" was used as a source for developing BILINDEX (1984) and its supplements.

As it can be noticed, the use of the National Library of Mexico "Subject Headings List" has been popular among Mexican libraries. One possible explanation to this situation is this list incorporated a major number of terms according to the Spanish spoken in Mexico. It was used the Real Academia Española Dictionary as main source to establish the Spanish form for the terms included in it. For technical and scientific terms, it was preferred the learned use instead the popular one since the last one changes among regions. Certainly this list includes the authority work of a national library; however, due to also contains general and specific terms, it can be useful for public, school, university, and other kind of libraries.

Some of the key features of the National Library of Mexico "Subject Headings List" are the inclusion of:

Terms for indigenous languages and tribes names:
CHINANTECO, HUICHOL, NAHUA, OTOMI, TARASCO, TZELTAL; CORAS, CHICHIMECAS, LACANDONES, MAZATECAS, TOTONACOS, TZELTALES

Local subdivisions:
MICHOACÁN-CONDICIONES SOCIALES
NUEVO LEÓN- DIVISIONES POLÍTICAS Y ADMINISTRATIVAS
GUATEMALA-LÍMITES
GUADALAJARA- CALLES- CALLE DE SAN FRANCISCO
GUAYAQUIL, ECUADOR- HISTORIA

Local history subdivisions:
MÉXICO- HISTORIA-DESCUBRIMIENTO Y CONQUISTA, 1517-1521
MÉXICO-HISTORIA-VIRREINATO-1535-1821
MÉXICO-HISTORIA-CONSTITUCION Y REFORMA- 1855-1863
MÉXICO- HISTORIA-REVOLUCION , 1910-1917.

Entries for corporate bodies
INSTITUTO MEXICANO DEL SEGURO SOCIAL

INSTITUTO NACIONAL DE ANTROPOLOGÍA E HISTORIA, MÉXICO
INSTITUTO NACIONAL DE CARDIOLOGÍA, MÉXICO
INSTITUTO NACIONAL DE ANTROPOLOGÍA E HISTORIA, MÉXICO
MÉXICO. SECRETARIA DE COMUNICACIONES Y OBRAS PUBLICAS

National Library of Mexico "Subject Headings List" Updating

Due to the National Library of Mexico "Subject Headings List" has been adopted and used by the majority of Mexican libraries for their subject cataloging practices since its publication, it is convenient to think about a new edition of this popular subject indexing tool. Although there was not other printed edition of this subject headings list, authority subject catalog continued being enlarged, so it is a feasible task to develop an up-to-date edition of the National Library of Mexico "Subject Headings List." Taking into account the importance of this tool for the subject work in Mexican and Latin American libraries, the UNAM University Center for Library Science Research has proposed to the National Library of Mexico to join efforts to develop a new edition of its "Subject Headings List."

The UNAM University Center for Library Science Research (*Centro Universitario de Investigaciones Bibliotecológicas*, CUIB) has among its aims to carry out research that supports solutions to library problems promoting innovation and modernization in libraries. In this way, CUIB has carried out two projects to develope controlled vocabularies. The first one was the creation of the "Tesauro latinoamericano en ciencia bibliotecológica y de la información (TELACIBIN)" [Latinamerican Thesaurus on Library and Information Science] (Naumis-Peña, Iglesias-Maturana, Osuna-Dumont, and Espinosa Ricardo, 1999), a Spanish-English subject tool to indexing LIS literature produced in Latinamerica. The second one was the "Macrotesauro mexicano para contenidos educativos" [Mexican Macrothesaurus to education contents] (2003), an indexing tool that contains over 20 000 terms to represent content of educational videos (Nahumis-Peña, 2003). The creation of these thesauri was supported by the software Thesaurus Construction System Liu-Palmer.

The main objective of a proposal to develop a Spanish Subject Headings List is the creation of a tool to support subject indexing and retrieval in Mexican and Latin American libraries. Before the creation of this Spanish Subject list, it will be necessary to identify and to assess the software that will support its construction. It should be a software to be able of: storing and searching over one hundred thousand terms; including references, and hierarchical and associative relationships; generating automatic indexes, cross references, formats and displays. Moreover, it will be necessary to develop guidelines for the establishment of subject headings forms, orthography, and translation according with the ISO 2788 and the ISO 5964. Likewise, it will be mandatory to figure out people to carry out this project and to train all the participants.

The first phase of this project should be to include subject authority records from the National Library of Mexico Subject Headings list in a database. A requirement for this phase is the database software will be able to manage authority records in MARC format. The next step in this project will be to include the English equivalents. Due to subject records from the National Library of Mexico Subject Headings List were created according to LCSH, it will be necessary to have the last LCSH edition (27th edition) to check if there

English equivalents exists or they have changed. If the English terms are already in the LCSH vocabulary, they should be included in the Spanish database, going over the references, and the hirarchical and associative relationships. If there are changes in the English equivalents, these changes should be taken into account. There willl be English terms in LCSH that do not have Spanish authority records; then, they would be checked in the Subject authority file of the UNAM General Direction for Libraries. Finally, there will be also English terms without Spanish subject records, so it will be indispensable the creation of these ones.

Final considerations
This paper has stressed the necesity to develop a Spanish subjects headings list. Likewise, it has showed an overview of the methods and procedures to carry out this project. Certainly, it is an ambitious assignment; however, to have an updated subject headigns list that fits Spanish language features is also a requirement to adequately organize bibliographic collections in Mexican and Latinamerican libraries. To accomplish this challenge, automation and information technologies currently offer many advantages and opportunities. Likewise, CUIB experience in creating thesauri will be very useful to sucessfully complete this endeavor.

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