

**Indigenous subject access,
Ngā Ūpoko Tukutuku the Māori subject headings thesaurus**
<http://mshupoko.natlib.govt.nz/mshupoko>

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Introduction, thanks and overview

[opening slide]

Thank you, Helen, for inviting me to speak about indigenous subject access at your Australian and New Zealand Theological Librarians Conference. It is a pleasure to be here with you all. Also with us this morning is Ann Reweti, of Te Āti Awa, the Māori Librarian for Wellington City Libraries, and a member of our Project Team. It is important to have Ann with us today as this thesaurus is for Māori and contains and provides a pathway to Māori knowledge.

[slide 2] Ngā Ūpoko Tukutuku, the Māori Subject Headings thesaurus, was developed as part of the Māori Subject Headings Project jointly sponsored by Te Rōpū Whakahau (the professional association for Māori in libraries and information management), LIANZA, and National Library of New Zealand.

The initial list was launched at Mataraki, the beginning of the Māori New Year in June 2006. It contains about 1,000 postable terms and is soon to be refreshed by an update.

[slide 3] I'll talk about why this thesaurus has been developed, the background history of its development, the concepts and methodology underlying its construction, and then show examples of its application.

Feel free to ask any quick clarifying questions as we go. I'll also allow time for questions or discussion at the end.

Why has this thesaurus has been developed?

[slide 4]

As librarians, we are in the business of providing access to information and the National Library Act 2003 includes the purpose of the National Library as "collecting, preserving, and protecting documents, particularly those relating to New Zealand, and making them *accessible for all the people of New Zealand ...*" The current Statement of intent, for 2007/08 expands that goal to include digital objects. [4]

How do we provide *subject* access to collected published materials? By applying international standard subject headings, the Library of Congress Subject Headings, LCSH. The value of

following international standards of course is that the bibliographic records created can be shared with our colleagues in Australia and worldwide.

The knowledge of Māori is carefully preserved in our libraries, archives and museums to some extent this careful preservation of indigenous knowledge causes subsequent alienation by providing inappropriate subject access. [1]

The organisation and systems used for subject access follow western paradigms. These ultimately reflect the culture of the country of origin and for Library of Congress Subject Headings this is American, white, middle class and male. No disrespect is intended because the method of applying and retrieving of controlled vocabulary searching of LC ethnic group subject headings, *for example*, gives comprehensive retrieval. Retrieval is successful if this paradigm is familiar or if a skilful librarian aids retrieval. For Māori, access to Taonga and Mōhiotanga, Treasures and Knowledge, can be blocked by a language and cultural barrier. Another member of our project team, Rangiiira Hedley, a te reo specialist and expert story teller from Ngāti Tūwharetoa tells a story that illustrates this well. Rangiiira talks of coming out of a Te Reo, Māori language, lecture at university with the need to find some karakia, the traditional chants, for waka, Māori canoes. Rangiiira went to the University library, searched the catalogue in Māori, found absolutely nothing and walked out in dismay. Rangiiira was completely immersed in the language.

A Māori language strategy launched in 1997 initiated a number of opportunities to learn Māori and Kōhango reo, Māori language pre-school, and other immersion schools have enhanced the rate of learning. There has also been an increased publication of educational material in Māori. These in turn, generate increased library use and an increased need for appropriate language access.

Ngā Ūpoko Tukutuku seeks to provide subject access from within a Māori worldview, *an appropriate pathway to indigenous knowledge*.

Some background history

[slide 5]

The beginnings have their documented origin in the first Te Ara Tika Project report, Te Ara Tika : Māori and libraries, a research report written by Tui MacDonald. Wellington, LIANZA, 1993. Ann Reweti worked on this project together with Sue Sutherland, Chris Szekely, Anna Chalmers, Lydia Klimovitch, Dick Grace. The introduction states that the report represents a commitment towards moving New Zealand librarianship along the path to a bicultural future.

Four years later in 1997 Chris Szekely, on behalf of TRW and LIANZA, wrote Te Ara Tika = Guiding voices : Māori opinion on libraries and information needs. Wellington, LIANZA & TRW, 1997. This was a survey of Māori experience and opinion on finding information in libraries, in particular, the difficulties experienced searching subjects.

Then the following year, 1998, a 2 day National Forum on Māori Subject Headings was convened at the Waikato University Library. The forum focussed on exploring solutions for providing better *subject access* for Māori library users.

The use of LCSH, the Library of Congress Subject Headings for subject access was discussed and this monocultural tool was seen to be difficult and unhelpful for Māori. The KUPU Māori thesaurus, developed by the Alexander Turnbull Library, had supplied some useful access but the content was not sufficiently focussed on Māori concepts. In practice, libraries were setting up their own local subject headings and these were unable to be shared between libraries. The forum resolved to meet tikanga Māori information needs as expressed in Guiding voices.

[At the forum in 1998, one of the 4 possible options suggested by the cataloguers there was for “The allocation of a standard field in the MARC record designed to be used for a local

nationally approved thesaurus”. That is exactly what has been achieved by Ngā Ūpoko Tukutuku, a thesaurus that can be used throughout New Zealand. As well as this, we have been able to gain authorisation from the MARC Standards Office of the Library of Congress for international application of the thesaurus. This means that bibliographic records created by New Zealand cataloguers, shared in Te Puna, the National Bibliographic Database, can be shared internationally and these are accepted as valid.]

Between the national forum in 1998 and 2003 there were a series of MSH Working Parties. [The workshops produced draft guidelines to underpin the structure of MSH following the principles of the Library of Congress Subject Headings. They also developed topical time and form subdivisions and guidelines for place subdivisions.] There was also discussion on personal and corporate name authorities. It was also recommended that an authoritative list of waka tūpuna, iwi and hapū names be developed. Construction of the Iwi Hapū Names List was begun in 2001 and implemented in 2004 in the National Library.

In 2004 a final survey was commissioned by the Māori Subject Headings Project Steering Group, and this culminated in the research report *Te ara tika = Guiding words*, by Sally Simpson. (This is available as an electronic text published Wellington, TRW, 2005. http://www.trw.org.nz/publications/Te_Ara_Tika_Guiding_Words.pdf) This records research with Māori library professionals and their patrons and examines the issues that were important to them when searching for information and *gathered together the topics of most importance*. These recommendations and topic lists also guided the development of the thesaurus.

Then in April 2005, a project was finally launched to *construct* the list of subject headings and the project team comprised 3 te reo consultants: Whina Te Whiu, Ngāpuhi, from Auckland City Libraries, who led the project up to the launch, Rangiriia Hedley, Ngāti Tūwharetoa from Waikato University and the Auckland Museum, Ann Reweti, [who is with us today Te Āti Awa, from Wellington City Libraries] and 2 cataloguers from the National Library: Judy Keats, an experienced cataloguer, and [myself] Robyn East. Judy and I applied the NISO (National Information Standards Organisation) Standard guidelines for construction, format, and management of monolingual controlled vocabularies. And they were almost as complicated as the title.

We came up with a less complex scenario than envisaged by the working parties by developing a *thesaurus* of topical subject terms to be applied without subdivision strings, and using MultiTees thesaurus software already available in the National Library.

[**slide 6**] This is slide used at the launch which coincided with Matariki, the Māori New Year and shows the constellation Pleiades, the star cluster that becomes brighter at this time of year.

One of the best outcomes for me was obtaining authorisation for the thesaurus from the MARC Standards Office of the Library of Congress. This authenticates the thesaurus internationally. Bibliographic records created applying these headings can be shared internationally. Gaining this authorisation was agonising but had a humorous outcome. With the launch planned for June 2006 I sent a request early in January to Antony Franks of the National Authority Control programme (NACO) that the NL participates in. The request included a suggested code for the thesaurus, as “reo” rather than the usual abbreviation of the name of the thesaurus, which would have been “nut”! The code is attached at the end of each heading. Antony agreed to act as our intermediary. No response was received to the January request so early in April I sent a repeat request. Again, mid-May, another request was sent, this time noting that our need had become very urgent and that we wanted to implement the

thesaurus by the end of May. I included this little plea to Antony: “If you think there is a flaw in our approach or presentation I’d be grateful to receive your comments.”

The next day Antony wrote back: “Oh ... this is very tempting! For all sorts of reasons, I’m in the sort of bad mood this morning that would enjoy having a reason as good as this to start a fight.” This was quite astounding to receive in the midst the formal emails!

4 hours later an email of one sentence arrived: “You should have a code at the end of next week.”

My reply was ecstatic – flinging formality aside – and included “I’m wondering what it took to get a result? Did you notice our *steely* grip on remaining polite?”

Antony’s reply: “Oh yes, and I appreciate it, it always works better in general ... especially here. [and here’s the method] My eyes close to slits. I become perfectly calm and still, my voice grows soft to almost a whisper, drops an octave or two, and people just do it.” I read it over and over, then to all who would listen!!!

There was also an apology for the delay from the Standards Office, so all is forgiven.

The thesaurus covers subjects in te reo Māori representing a range of topics found mainly in published materials. The initial list contains over 1,000 headings and their associated references. So far, the main focus is on traditional topics. The chief dictionary consulted was the 7th edition of Herbert Williams Dictionary of the Māori language, published in 1975.

Concepts and methodology [slide 7]

The thesaurus name - Ngā Ūpoko Tukutuku. The word **Ūpoko** is defined as head, upper part, by Williams, in his dictionary, and was used to identify chapters and headings by early writers such as Elsdon Best, Sir George Grey and John White. The word **Tukutuku** is the complex and intricate patterning of woven panels or latticework. In the weaving process two people work together sharing the task, one on each side of the panel, passing the fibre backwards and forwards to each other. We adopted this analogy for how the words are woven into the structure of the thesaurus, and for the way we worked as a team, each with separate knowledge that we wove together. Also, for people using the thesaurus to lead them to appropriate terms.



[slide 8] **The conceptual framework, a Māori world view.** We had to formulate a framework that provided an interface between two worldviews enabling the choice of the appropriate Māori words to provide the pathway or entry point and retain the integrity of both

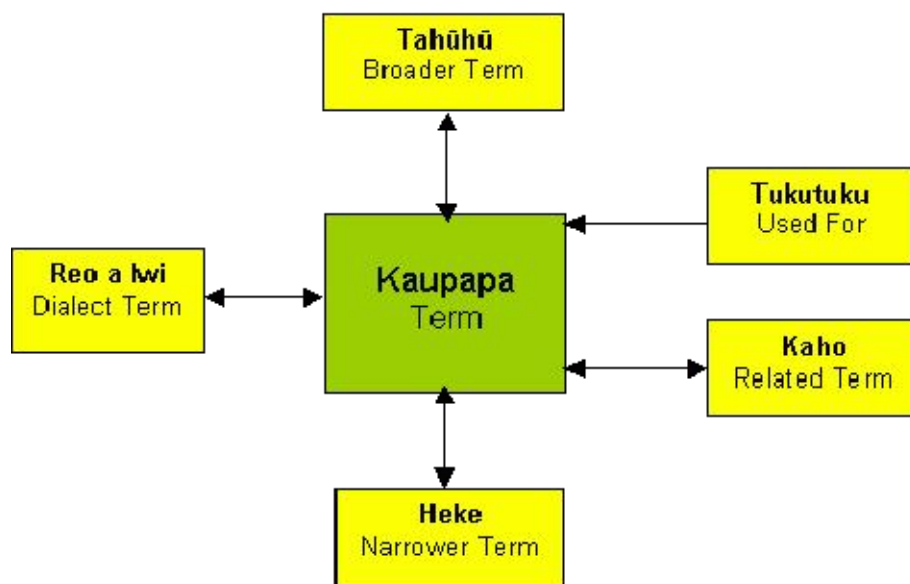
worlds. At each step we needed to check that the Māori worldview was not being compromised for the sake of an imposed file structure.

This diagram illustrates the holistic nature of a Māori world view where aspects of taha tinana / the people, taha wairua / the spiritual and taha hinengaro / the mind, are not taken separately, or studied in isolation. Each aspect impacts on the other to form a state of wholeness of the person. Everything is seen to come from the god Io and connects to the land. Descent is traced from Io and Te Kore to the separation of Ranginui and Papatūānuku. Descent is from the world of darkness to the world of light, to Te Ao Mārama. From the world of light has developed a Māori worldview, or a paradigm of Mātauranga Māori. (Charles Royal) This worldview arises out of cosmological whakapapa, told in metaphorical creation stories of the world. From the world of light came a world of knowledge, Mātauranga Māori.

A conventional framework for a subject headings list or a thesaurus is strictly hierarchical, with the main term, broader terms and narrower terms. There are related terms that refer both ways and have associated meanings, and the ‘used for’ terms, the ones not selected as headings, but have similar meanings. There is also usually a scope note assisting definition and application of the main term.

[slide 9] **The thesaurus file structure.** The thesaurus file structure we developed is still hierarchical, but able to reflect a Māori worldview. [?Just as a conventional framework is hierarchical, so is a Māori worldview, and the hierarchy is called whakapapa.]

Ngā Ūpoko Tukutuku file structure



Whakamārama Scope note

The **Kaupapa** or Term chosen is usually a word, sometimes a phrase. Each term has a **Whakamārama** or scope note explaining the meaning in Māori and a **Scope note** in English. There are **Tahūhū** or Broader terms which, in their turn, are also **Kaupapa** or Terms ; and there are **Heke** or Narrower terms.

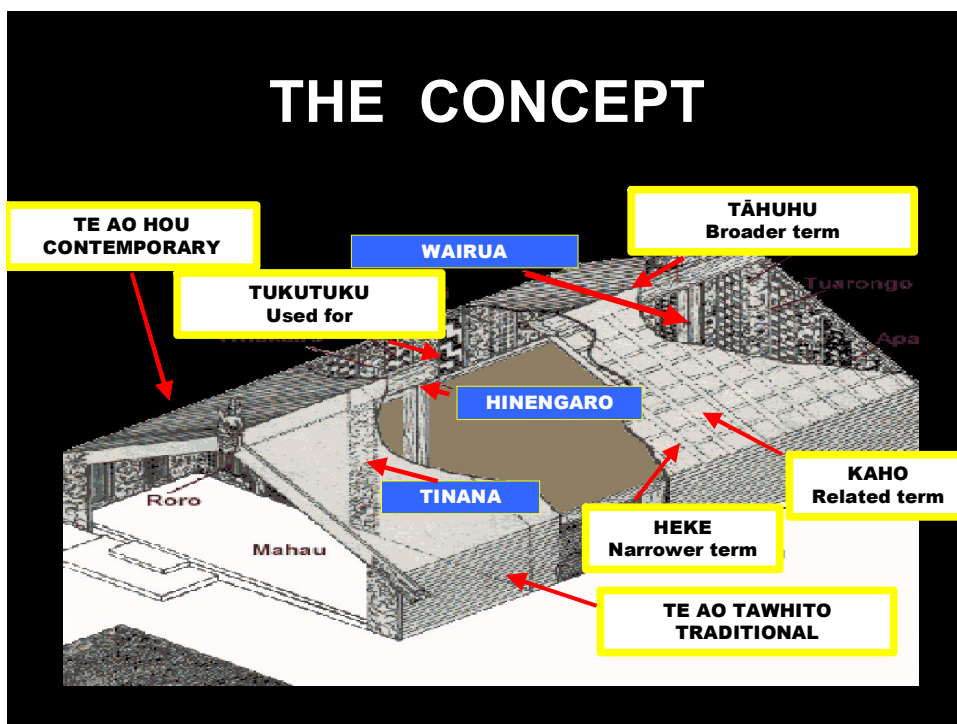
The **Tukutuku** are the Māori unpreferred or Used for terms that point to the Kaupapa or Term ; and the **Used for** or English unpreferred terms lead to the preferred Kaupapa or Term. The **Reo a Iwi** or Dialect terms also point to the Kaupapa or Term, the difference is that the Reo a Iwi will have a Whakamārama and Scope note naming (and acknowledging) the iwi that uses this variant form of the word. So they act as a Tukutuku but the iwi usage is recorded.

The other relationship is the **Kaho** or Related term, which has an associative relationship with the Kaupapa or Term that is not hierarchical and points to other possible Kaupapa.

The Kaho are the trickiest terms to establish, as they are neither equivalent nor hierarchical. They are conceptually or semantically linked and where one is used the other should always be implied. The international standard then lists 14 possible types to consider. (8.4. ISO standard).

[In thinking through the selection of a Kaupapa/Term and Kaho/Related term to apply to a book in hand, we need to remember the Māori holistic view, and think more widely than we would for a European worldview. Collections within libraries have been arranged according to a European worldview. Māori have their own worldview or Mātauranga Māori.]

[slide 10] We also used the diagram of a meeting house as our symbolic representation for the hierarchy and process but we need to move on to look at the thesaurus and some examples.



[slide 11] The introductory page of the thesaurus shows the **Main Index**. A downloadable version of NZ specific MARC authority records is also available for your library system and these records are in the NL catalogue and the NBD.

[Downloadable version for your library system: [Unicode/UTF-8](#) or [non-Unicode/MARC8](#) (MARC ZIP file 138 Kb)

If you look up a word *all* the index tabs will be visible.

The **Top Term Index** lists all the broadest terms in the thesaurus in an alphabetical list. A selected term from this Top Term list, will display the **Hierarchy** and the place of the term in

relation to other terms within its own hierarchy. You could then go back to the Main Index or Top term index. So the list of terms in the thesaurus can be grouped in several different views as well as one continuous alphabetical list.

Terms in *italics* are references and will lead to words chosen as subjects.

[side 12] Now for some examples of application

[slides 13-29 – no detailed notes for these examples]

Te Papa press produced a number of reprints of Elsdon Best work that coincided with constructing the thesaurus. Originally published 1925.

Application of the thesaurus **

Then go through entries: Waka etc.

Te tangata: Tikanga tuku iho – related to Tikanga (rites, rituals, customs) and is for Values = the abstract values and principles which underlie Māori social relations and correct conduct.

Atua = the gods. Karakia = in the traditional sense are intoned incantations or spells, a dialogue with the gods carried out by a tohunga/priest – the contemporary equivalent is the Christian equivalent of prayer.

Adding thesaurus terms to MARC bibliographic records

The subject headings are used exactly as they appear in the thesaurus list. None are intended for use as subdivisions so there is no ability to form a string of headings as with Library of Congress Subject Headings.

The Library of Congress, MARC Standards Office has authorised the use of a source code ‘reo’ to identify Ngā Ūpoko Tukutuku/Māori Subject Headings terms used as subject headings. These headings should be added to MARC bibliographic records in the following way:

e.g. 650 _ 7 \$a Whenua. \$2 reo
650 _ 7 \$a Tiriti o Waitangi. \$2 reo

Ngā Ūpoko Tukutuku/Māori Subject Headings does not contain personal or corporate body names or geographical place names.

[slide 30] National Library implementation

**[Appropriate subject headings are added to bib when ...] If there is an appropriate subject heading in Ngā Ūpoko Tukutuku/Māori Subject Headings, it is added to bibliographic records when:

- the work is written in te reo Māori or is bilingual, with one of the languages being te reo Māori, **and/or**
- at least 20% of the content is for and/or about Māori.

These headings are used in addition to the Library of Congress Subject Headings.

e.g. 650 _ 0 \$a Canoes and canoeing \$z New Zealand.
650 _ 7 \$a Waka. \$2 reo

If there is coverage of a general topic and more than 20% coverage of a specific aspect within that topic, then both general and specific headings are added.

e.g. 650 _ 7 \$a Waka. \$2 reo
650 _ 7 \$a Waka taua. \$2 reo

Authority records

MARC authority records have been created from the MultiTes thesaurus and appear on both the National Library of New Zealand catalogue and the National Bibliographic Database. They have been created to make the headings easier to search and more accessible for cataloguers.

These authority records are not intended to replace the MultiTes thesaurus. In fact, they cannot replace it because not all the information in the thesaurus can be added to the authority record. In particular, the authority record cannot duplicate the Whakamārama and Scope notes of the reo a iwi/dialect terms.

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