



**Library and Archives Canada**

# **Directive on the Official Language of Description**



# Directive on the Official Language of Description

## 1. Effective date

This directive has been approved by Management Board of Library and Archives Canada (LAC) and takes effect on 23 May 2017.

## 2. Application

As of the effective date, this directive applies to all LAC activities that involve the creation or modification of descriptive metadata about LAC holdings that clients access via LAC's external web site. This directive applies to descriptive metadata for both published and unpublished documentary heritage in LAC holdings.

The directive also applies to LAC services that involve the creation of metadata by LAC cataloguers for publications created in Canada, but which are not necessarily part of LAC holdings. This includes publication information and bibliographic records created by LAC that are provided to publishers or Canadian and foreign libraries collecting Canadian publications.

It does not apply to any corporate content produced by LAC and managed through the [www.canada.ca](http://www.canada.ca) web site.

This directive should be applied in conjunction with the [Library and Archives Canada Subject Heading Policy](#), the [Bilingual Cataloguing Policy](#), and the *Policy on the Language of Description for Archival Documents*. See aforementioned policy instruments for detailed instructions on describing both LAC holdings and Canadian publications catalogued but not acquired by LAC (e.g., Cataloguing in Publication) and archival resources, in accordance with accepted international and national library and archival standards and practices.

## 3. Definitions

See more definitions in [Appendix A](#).

### **Basic descriptive metadata [*Métadonnées descriptives simples*]**

Basic descriptive metadata is information that reflects the key characteristics of an information resource (IR) and which establishes its intellectual content, access rights or physical attributes, and facilitates its discovery. It may be an intrinsic part of metadata established when the IR was originally created or directly transcribed from the IR. Basic descriptive metadata also includes the information created by

transcribing the content, either by LAC staff, optical recognition conversion or third party activities. Basic descriptive metadata may be created or modified both before and after transfer to LAC. Basic descriptive metadata enables clients to discover LAC holdings and related bibliographic information at, for example, the name, title, finding aid, file, and/or item levels.

### **Enhanced descriptive metadata [*Métadonnées descriptives enrichies*]**

Enhanced descriptive metadata is information that establishes broad contextual and background information on the intellectual content, subject, or relationships of documentary heritage IRs. It may be created by LAC, supplied by the creator/donor, or provided by third party. Enhanced descriptive metadata enables clients to discover LAC holdings at a higher-level, for example, in series and fonds descriptions, biographical, and administrative fields, or via subject access (subject headings and classification numbers).

### **Service [*Service*]**

An activity is considered a service when all four of the following components are present: 1. Client; 2. Product; 3. Process; and 4. Authority.

In the context of this directive, enhanced description is considered a service provided by LAC, in that relevant contextual information is analyzed by LAC staff according to professional standards in order to facilitate discoverability by clients.

On the other hand, the harvesting or simple manipulation of basic descriptive metadata does not constitute a service; it is merely a partial process. Harvesting or simple manipulation of metadata elements does not result in the transformation of the metadata into a new product.

## **4. Context**

LAC is mandated to acquire, preserve, and make known Canada's documentary heritage for the benefit of present and future generations. Increasingly, LAC clients are using the Web as the means of searching, discovering, and accessing our collections. To ensure that access is as easy as possible, users need accurate and effective online discovery tools, such as catalogues, dedicated thematic guides, and virtual exhibitions. When creating, repurposing or presenting these types of tools, LAC must respect all applicable legal and policy requirements, national and international professional standards and practices of library and archival science, as well as financial and human resources considerations. This *Directive on the Official Language of Description*, which falls under LAC's [Access Policy Framework](#) (2016) and the [Policy on Making Holdings Discoverable](#) (2013), outlines specific

requirements pertaining to the creation and management of descriptive metadata in Canada's two official languages.

As a federal government institution, LAC is subject to the [Official Languages Act](#), the [Policy on Official Languages](#), and the [Policy on Communications and Federal Identity](#). Specifically, Part IV of the *Official Languages Act* states "Every federal institution has the duty to ensure that any member of the public can communicate with and obtain available services from its head or central office in either official language and has the same duty with respect to any of its other offices or facilities (a) within the National Capital Region; or (b) in Canada or elsewhere, where there is significant demand for communications with and services from that office or facility in that language." In addition, Part VII of the *Act* outlines the government's commitment to "(a) enhancing the vitality of the English and French linguistic minority communities in Canada and supporting and assisting their development; and (b) fostering the full recognition and use of both English and French in Canadian society."

The Treasury Board of Canada Secretariat tasks departments with developing their own policy suites and tools to support official languages policy implementation and compliance. The standardized application of relevant legislation and policy to federal government websites is facilitated by the common use of the Canada.ca platform for active corporate content. Given that LAC is exempt from migrating documentary heritage, metadata and supporting services to the Canada.ca platform, the current directive defines how LAC will meet official languages obligations when carrying out descriptive activities.

LAC must also respect accepted international and national professional standards and practices of library and archival science. As the steward of documentary heritage created by others, LAC must ensure that publications and archival records in the holdings retain their original form and authenticity. Likewise, LAC must protect the descriptive information about the holdings by preserving its accuracy, reliability, authoritativeness and authenticity. The balance between improving discoverability through translation of descriptive metadata on the one hand, and respecting the original source on the other, varies depending on the type of material and the context of creation. Copyright law, for example, limits the translation of publication titles, while translating descriptive metadata for unpublished records can amount to an act of undue interpretation. Alongside legislation and policy, the professional expertise of library and archival staff is key to ensuring that the management of descriptive metadata at LAC is aligned with relevant standards and best practices.

LAC's policy approach to the translation and management of descriptive metadata is contingent on human and financial resources. Effective description of documentary heritage is a complex activity that requires professional training, and, similarly, the accurate translation and revision of good descriptive metadata require appropriate expertise. In delivering on its mandate as a whole, LAC is constantly challenged with the critical task of reconciling fiscal realities with stakeholder expectations for additional content to be discoverable. For a list of relevant policy instruments and related documents see [Appendix B](#).

## **5. Purpose**

The purpose of this directive is to outline how LAC fulfills its commitment to make its holdings discoverable in alignment with the *Official Languages Act*, the *Policy on Official Languages*, and the *Policy on Communications and Federal Identity*, while still respecting its mandate as the custodian of documentary heritage and allocated resources. Moreover, this directive outlines LAC's approach to enabling discovery of the holdings in a manner that is accurate and authentic with respect to the original publications and archival records.

## **6. Requirements**

LAC distinguishes between basic descriptive metadata and enhanced descriptive metadata, where the latter is a service provided by LAC to the public.

### **6.1 Basic Descriptive Metadata**

LAC harvests and/or manipulates basic descriptive metadata in the language in which the information resource was created.

#### **6.1.1 Published Descriptions**

For unilingual publications, LAC creates one catalogue record in either English or French. Descriptive metadata elements (i.e., fields including title, author, publisher, and contents) are transcribed in the language of the publication in order to create a true and accurate representation of that publication. Cataloguing of aboriginal or foreign language publications is completed in English, according to *LAC's Bilingual Cataloguing Policy* and the *Resource Description and Access: RDA standard*.

All bilingual and multilingual publications containing substantial portions of text in both English and French will be catalogued twice, once in English and once in French.

### **6.1.2 Unpublished Descriptions**

For unpublished holdings, LAC provides the content of descriptive metadata fields at the sub series and below in either English or French, according to the prevalent language of creation. Descriptive metadata at the sub series and below is considered basic metadata and, in accordance with accepted archival standards and practices, is normally done in the language of creation. For audio-visual media in a foreign language, items are described in the language of accompanying material rather than in the language of creation.

Descriptive metadata at the sub series and below comprises accession-level descriptions and file lists or finding aids where files, volumes or items are listed. These finding aids are provided in English or French, based on the language of the records listed.

For archival records containing substantial portions of text in both English and French (as determined by the professional judgment of the describer), basic descriptive metadata will normally be provided in both official languages. Other methods designed to facilitate consultation (e.g., subject headings, personal name headings or corporate name headings) may be provided in both official languages, in so far as there are official or established equivalents.

## **6.2 Enhanced Descriptive Metadata**

The provision of enhanced descriptive metadata is a service provided by LAC that reflects the research and analysis involved in placing information resources into their historical and cultural context. The metadata created through this service enables the discoverability of documentary heritage holdings. As a service, enhanced descriptive metadata is provided to the public in both official languages, in accordance with official languages requirements.

LAC provides broad contextual and background information on the content, subject, physical attributes, or relationships of documentary heritage in both official languages, including by creating bilingual on-line exhibitions, research aids, and/or thematic guides.

### **6.2.1 Published Descriptions**

For unilingual publications, LAC enables discoverability by providing subject headings in both official languages on full and core level catalogue records. Personal or corporate body name descriptions may be provided in both official languages, in so far as there are official or established equivalents. LAC also applies Library of Congress Classification and Dewey Decimal Classification to publications, thereby expressing the subjects of works in language-neutral notation.

### **6.2.2 Unpublished Descriptions**

LAC creates and manages bilingual archival descriptions at the series level and higher, and creates on-line bilingual research guides and aids.

For descriptions below the series, other methods designed to facilitate consultation (e.g., subject headings, personal name headings or corporate name headings) may be provided in both official languages, in so far as there are official or established equivalents.

### **6.3 Descriptive Infrastructure**

LAC provides online interfaces for discovering published and unpublished holdings in both official languages. These interfaces search the metadata in LAC's descriptive systems. This includes an archival database that supports English and French equivalent descriptions. For publications, LAC also provides the infrastructure to support the assignment of subject headings in both official languages as well as of personal and corporate name headings in English or French.

## **7. Roles and Responsibilities**

Discoverability is a shared responsibility across LAC. More specifically:

- 7.1.** The Assistant Deputy Minister and Chief Operating Officer is responsible for the implementation of the directive, with support from the Directors General of Public Services Branch, Preservation Branch, Government Records Branch, Published Heritage Branch, and Private Archives Branch, all of whom share responsibility for ensuring their staff acquire, ingest, create, modify, and/or manage basic and enhanced descriptive metadata in accordance with this directive. This includes coordinating the translation of enhanced descriptive metadata.
- 7.2.** The Director General, Communications is responsible for ensuring that her or his staff work with the Operations Sector to provide editing and translation services within established timeframes and standards. Content that is used for communication purposes will be provided in both official languages as per relevant Government of Canada legislation and policies.
- 7.3.** The Director General, Innovation and Chief Information Officer is co-responsible, with the Operations Sector, for the structure of the data and responsible for maintaining an application which is capable of supporting Official Languages requirements, e.g., English and French equivalent archival descriptions and the ability to assign Subject Headings in both official languages.

**7.4.** Managers and staff create and modify, and/or manage descriptions of published and unpublished holdings in accordance with this directive and the *Access Policy Framework* suite.

## **8. Monitoring, evaluation and review**

The Assistant Deputy Minister and Chief Operating Officers monitors and analyzes the implementation of the directive to evaluate the progress, effectiveness, attainment of objectives and outcomes, and potential improvements.

The Director, Strategic Research and Policy will review the directive after five years, or as required.

## **9. Consequences**

In support of this directive, managers ensure corrective actions are taken to address instances of non-compliance with its requirements. Corrective actions may include training, changes to procedures and systems, and other measures.

Consequences of non-compliance may include informal follow-ups, or formal direction on corrective measures.

## **10. Information**

Please address any questions about this directive to:

Director, Strategic Research and Policy  
Library and Archives Canada  
550 de la Cité Boulevard  
Gatineau, Québec K1A 0N4  
Email: [bac.politiques-policy.lac@canada.ca](mailto:bac.politiques-policy.lac@canada.ca)

## Appendix A: Definitions

See also section [3. Definitions](#) and the Appendix A of the [Access Policy Framework](#).

### **Descriptive metadata [*Métadonnées descriptives*]**

Information that establishes the intellectual content, access rights and physical attributes of documentary heritage to support its discovery.

### **Finding Aids [*Outil de recherche*]**

Tools to help access and facilitate the retrieval of archival material. They include descriptive inventories such as file lists, volume lists and box lists, as well as conversion lists, card indices, file classification manuals, guides, accession registers, shelf lists and automated databases. Finding aids may be created by the originating department or by LAC staff.

### **Harvesting [*Moissonnage*]**

The act of copying, transcribing, capturing or transferring metadata from digital and / or analogue information resources to support discoverability.

### **Metadata [*Métadonnées*]**

Information used to contextualize, manage, preserve and provide access to documentary heritage.

### **Published Holdings [*Ressources publiées*]**

Published holdings are library matters of every kind, nature and description resulting from the act of publishing and releasing for public distribution or sale. Publications include material such as books, maps, periodicals, documents, working or discussion papers, audio or video recordings, on-line/networked publications (both static and dynamic), and compact discs. Publications can be in any format on or in which information is written, recorded, stored or reproduced.

### **Unpublished Holdings [*Ressources non publiées*]**

Unpublished holdings include any documentary heritage material under the control of LAC which were not formally published on-line or through a publishing company intended for mass distribution before acquisition. Unpublished holdings may include correspondence, notes, graphic representations and audio-visual recordings regardless of physical form or characteristics.

## **Appendix B: Related Documents**

### **Laws**

[Constitution Act, 1982 \(Charter of Rights and Freedoms\)](#)

[Library and Archives of Canada Act](#)

[Official Languages Act](#)

[Official Languages \(Communications with and Services to the Public\) Regulations](#)

### **LAC Policy Instruments**

[Access Policy Framework](#)

[Bilingual Cataloguing Policy](#)

[Metadata Framework for Resource Discovery](#)

[Policy on Making Holdings Discoverable](#)

[Policy on the Language of Description for Archival Documents](#)

[Subject Heading Policy](#)

### **TBS Policy Instruments**

[Directive on Official Languages for Communications and Services](#)

[Policy on Communications and Federal Identity](#)

[Policy on Official Languages](#)

[Policy on Service](#)

[Standard on Metadata](#)

### **Other**

[Resource Description and Access: RDA \(Standard\)](#)