ALA Core SAC Working Group on \$v Retention Informational Statement about Form Subdivision Changes in "Modern MARC"

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The Library of Congress <u>announced in January 2025</u> that as part of a Linked Data-friendly "Modern MARC" cataloging practice, they will no longer include form/genre subdivisions (e.g., 600 \$v, 650 \$v, 651 \$v) in subject headings.

For example, they would omit the \$v subfield at the end of subject headings like these:

- Nightingale, Florence, \$d 1820-1910 \$v Archives
- Berlin (Germany) \$v Guidebooks
- Vampires \$v Juvenile fiction
- Mendieta, Ana, \$d 1948-1985 \$v Catalogs
- Concertos (Violin) \$v Solo with piano

To convey form and genre, the Library of Congress will instead use only LCGFT genre/form terms in separate fields (MARC field 655). For more examples of what such records might look like, click here.

The American Library Association Core Subject Analysis Committee Working Group on \$v Retention has prepared this informational statement to share broadly what the Library of Congress and other organizations have said/done to date relating to the upcoming changes, and to detail potential impacts of the changes on library collections, catalogs, staff, and patrons. This document will be updated as we learn new information.

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What we know so far

• The Library of Congress said that removing form subdivisions (\$v) would make LCSH more linked data compliant (from here or this nearly identical statement posted a month earlier): "Library of Congress Subject Headings (LCSH) policies on genre/form subdivisions are not linked data compliant, since for many LCSH heading + genre/form subdivision(s) strings, there is no corresponding comprehensive URI. BIBFRAME is an opportunity to make LCSH more linked data compliant. Modern MARC records will not

- always include LCSH form subdivisions. In lieu of LCSH form subdivisions, a faceted term from Library of Congress Genre/Form terms (LCGFT) will be assigned in the 655 field to identify the genre/form of the resource."
- The Library of Congress said that removing \$v would facilitate less data duplication of genre terms (see slide 11 here, or download the "Modern MARC" PowerPoint via here): "fewer genre/form subdivisions, more 655s"
- As of April 2025, LC has been separating form and topical subdivisions in Library of Congress Subject Heading Manual instructions. To date: <u>H 1100</u>, Free-floating Subdivisions: Classes of Persons; <u>H 1103</u>, Free-floating Subdivisions: Ethnic Groups; <u>H 1154</u>, Pattern Headings: Languages; <u>H 1156</u>, Pattern Headings: Literatures
- Per the <u>Library of Congress Report to ALA/CORE Committee on Cataloging: Description and Access, June 2025</u> (page 4): "The next steps for the project to address the form subdivisions in relation to full implementation of LCGFT continue. Current work focuses on analyzing the form subdivisions to ensure there are appropriate replacements in LCGFT for all subdivisions and prepping the Subject Headings Manual for this change. No form subdivision authority records will be deleted and all instructions for those who wish to continue to use them will be maintained."
- Per the PCC Participants Meeting, July 17, 2025, PCC members may still use \$v in cataloging records (see slide 20 here or download the "Main slides" if desired from here): "Q: In light of LC's recent announcement, should other PCC members discontinue using LCSH form subdivisions in \$v? A: No. The subject form subdivision (\$v) may still be used as specified in the LCSH Subject Headings Manual, with or without corresponding genre/form terms in 655 fields. The decision to use \$v, and how form information is ultimately displayed for users, depends in part on how each institution's discovery layer is configured."

Potential patron search problems with \$v removal

- Possible impediments to patron searching, since subjects with \$v have different usage than genre fields.
 - Example: Finding all paranormal romance fiction is possible using the LCGFT subgenre term "Paranormal romance fiction." But finding books across all fiction genres that feature characters with depression would be possible only using a subject with \$v, such as "Depressed persons \$v Fiction". With the change, the subject would just appear as "Depressed persons," intermingling fiction and nonfiction (and movies, comics, etc.) into a much larger search result set that would need additional narrowing to recreate the utility of the single subject string.
- Patrons might lose an easy visual differentiation between juvenile and adult materials when searching.
 - Example: Public catalog records would lose the ending of strings like "Police \$v Juvenile fiction" versus "Police \$v Fiction" (the subject would just appear as "Police"). This is particularly problematic since LCGFT does not allow audience-related terms (so there is no "Children's fiction" genre equivalent to use instead).

- Patrons might lose an easy way to locate topics in different media, or differentiate between fiction and nonfiction.
 - Example: Patrons would not be able to search on strings like "Zombies \$v
 Fiction" versus "Zombies \$v Drama" versus "Zombies \$v Comic books, strips, etc." to find their desired media (the subject would just appear as "Zombies").
 - The heading "Zombies" would include both nonfiction books on the topic (perhaps movie critiques or literary criticism) and all fictional media, and patrons would need to narrow/facet more than previously to recreate the utility of the lost subject string with \$v.
 - Example: Without \$v\$ patrons could not differentiate immediately between a fictional story about George Washington (Washington, George, \$d 1732-1799 \$v Juvenile fiction) versus a biography (Washington, George, \$d 1732-1799)
- Patrons might lose connections that can currently be made across subforms on various topics using a single search string.
 - Example: Without the string "Depression, Mental \$v Comic books, strips, etc."
 patrons looking for all comics with depressed characters would need to search
 using "Depression, Mental" and narrow/facet multiple times (using genre terms
 for comics, graphic novels, manga, etc.). Patrons would need to do more clicking
 to possibly replicate the utility of the single string.
 - Example: Without the subfield "\$v Early works to 1800," rare and special collections materials across divergent subjects would be hard to gather using a single search
- \$v removal breaks the utility of subject strings in full record display for patrons (severing the connection between older and newer catalog materials in various genres/media, making comprehensive searches impossible).
 - Note that patrons likely do not know that this is happening, so do not know to
 expect less than comprehensive search results from searches they formerly used
 (i.e., patrons will not understand why searches do not find the newest works
 anymore; they might assume that the library is missing works of interest actually
 in the collection, diminishing collection accessibility)
- Form subdivisions provide one of the best ways to describe specific, complex facets of archival collections and other specialty materials. So \$v removal might specifically hinder archival and special collections searches (removing such qualifying \$v terms as "\$v Early works to 1800," "\$v Archives," "\$v Records and correspondence," "\$v Specimens," etc.)
 - Example: The difference between a book about *Photography of trees* versus a collection of photographs of trees ("Trees \$v Photographs"). To further illustrate, that archival collection of tree photographs may have been collected by John Smith, which would constitute "Smith, John \$v Archives." This collection is not about Smith, but it is relevant to someone interested in his archives or records.
 - Example: This is especially true for subject-specific collections (like art). For example, \$v allows users to differentiate between a single artist's monographs, exhibition catalogs, catalogues raisonnés, and conference publications at a

- glance in a subject search. These resources would otherwise fall undifferentiated under the subject heading for the artist's name.
- Example: Without "\$v Specimens" it might be harder to locate rare materials and unique objects, particularly for items that do not have LCGFT equivalent terms
- The removal of \$v would also potentially hinder academic/student catalog searches.
 - Example: If a student needs primary sources, \$v subdivisions such as "\$v
 Correspondence" or "\$v Diaries" differentiate primary sources from works about
 those topics (i.e., "Nightingale, Florence, \$d 1820-1910 \$v Correspondence").
 Without these, a student can waste time searching, needing to locate and click
 on extra catalog facets.
 - Example: This is further illustrated in a theological library, where the form subdivision "\$v Commentaries" is indispensable. Because there are so many resources on various Bible books with the book as a topical subject, if a student is doing a commentary comparison, for example, the subject "Bible \$p Genesis \$v Commentaries" enables them to differentiate between commentaries and other books on the topic. It allows them to call up a full list of books with that subject string, using their time more efficiently.
- These potential impediments to patron subject searching would have a real impact, since research shows that patrons actually look at subjects in library catalog records, even if they do not initially search using them (for example, examining records of previously enjoyed works to find new, similar ones). Losing \$v would mean that searches done using this method would be incomplete (patrons would lose the utility of easy searches via hyperlinked subject strings nearly universally present in library catalogs).
 - Example: "[Avid readers] made a subject search, when they did not have a specific author or title in mind. It was considered as a relatively easy and handy way of accessing interesting novels." from: Saarinen, Katariina and Pertii Vakkari. "A Sign of a Good Book: Readers' Methods of Accessing Fiction in the Public Library." *Journal of Documentation* 69, no. 5 (2012): 747. https://doi.org/10.1108/JD-04-2012-0041
 - Example: "A search-by-analogy tactic is generated when readers want something similar to a novel they have read." from: Mikkonen, Anna and Pertti Vakkari.
 "Finding Fiction: Search Moves and Success in Two Online Catalogs." *Library & Information Science Research* 38 (2016): 61.
 https://doi.org/10.1016/j.lisr.2016.01.006
 - Example: "When patrons searched using broad genres in the catalog and scanned the results to determine subgenres via other information, 25% looked at subjects; this was second only to summaries (36%), and more frequent than cover/container (18%) or creator (16%). Several respondents searched using subjects and genres from catalog records of works they previously enjoyed." from: Tomaras, Deborah, Allison Bailund, Joshua Bergmann, Abby Dover, Steven W. Holloway, and C. Rockelle Strader. "Genre Audiences, LCGFT and User Warrant: An Exploratory Study." Cataloging & Classification Quarterly (2025): 11. https://doi.org/10.1080/01639374.2025.2521297

Potential public catalog/discovery layer problems with \$v removal

- Many library catalogs lack direct genre/form search capability, even in the advanced search menu. This would mean that removing \$v from subjects, and relying only on genres, would make formerly-visible information unfindable and unusable for patrons.
 - Example: "A total of 62% of library respondents reported that their catalogs lacked a dedicated genre search option in the basic search; 51% had no dedicated genre search options." from: Tomaras, Deborah, Allison Bailund, Joshua Bergmann, Abby Dover, Steven W. Holloway, and C. Rockelle Strader. "Genre Audiences, LCGFT and User Warrant: An Exploratory Study." Cataloging & Classification Quarterly (2025): 11. https://doi.org/10.1080/01639374.2025.2521297
 - Example: "In 100% of the [eight] library catalogs I searched, there is no direct genre/form search capability, even in the advanced search menu." from: Deborah Tomaras. "Problems with the Removal of \$v (Form Subdivisions) in 'Modern MARC': PCC At Large Virtual Conference, April 23-24, 2025."
 https://docs.google.com/presentation/d/1KAFFU3pMmsX_SFUSnzLl68-XwxcywJloD-pbuW8n8wE/edit?usp=sharing
- Some library catalogs also lack genre/form faceting capabilities (meaning that records with no \$v and only genres might make it impossible for patrons to narrow results to find works of interest). Similarly, some library catalogs have \$v information in either a "Subject" facet, or split between a "Form" facet and a "Subject" facet—meaning patrons might have to click more than one facet to recreate the utility of the \$v. Genre terms in the "Subject" facet might take subject form, and might be indexed as subjects, instead of genres (meaning patrons could not search them separately).
 - Example: "[N]early half of public catalogs (44%) did not allow narrowing/faceting by genres; 50% did not allow it in the basic search. Several respondents mentioned that genres were folded into the subject index and could not be searched separately." from: Tomaras, Deborah, Allison Bailund, Joshua Bergmann, Abby Dover, Steven W. Holloway, and C. Rockelle Strader. "Genre Audiences, LCGFT and User Warrant: An Exploratory Study." Cataloging & Classification Quarterly (2025): 11. https://doi.org/10.1080/01639374.2025.2521297
 - Example: "Two of eight libraries don't have any genre/form faceting capabilities, either. In five catalogs, \$v information might be either in the 'Subject' facet, or split between a 'Form' facet and a 'Subject' facet (meaning patrons have to click more than one facet to recreate the utility of the \$v). I say might be genres, since the terms in that subject facet often take subject form (like the LCSH "Fantasy comic books, strips, etc." instead of the LCGFT "Fantasy comics"). Since terms like "Graphic novels" exist in the LCSH as well as LCGFT, there's no way to tell if these catalog facets are using intermingled subjects and genres, or only subjects. Only one catalog has a dedicated genre facet." from: Deborah Tomaras. "Problems with the Removal of \$v (Form Subdivisions) in 'Modern MARC': PCC At Large Virtual Conference, April 23-24, 2025."

https://docs.google.com/presentation/d/1KAFFU3pMmsX_SFUSnzLl68-XwxcywJloD-pbuW8n8wE/edit?usp=sharing

- Some library catalogs lack hyperlinked genres in the full record display, so patrons could
 not click on those to find related works of potential interest when looking for new works
 (see research on patron searching above). Similarly, some library catalogs label
 everything in the full record display as subjects, and hyperlinks go to a subject search,
 with mixed form and topical search results; this means patrons might have to sift through
 more unwanted search results to try to find what they are interested in.
 - Example: "Only one library had hyperlinked genres labeled as such (and they, if clicked, actually went to a subject search with mixed form and topical search results). Two libraries displayed entries clearly labeled as genres, but not hyperlinked or searchable (window-dressing, mostly). Five of eight libraries labeled everything as subjects, and hyperlinks went to a subject search, with mixed form and topical search results; as with the subjects facet, it's not always certain whether these are indexing and searching on 655s, or just 650 equivalents for genres. In one catalog, genres sometimes appeared labeled as 'Index terms,' sometimes as 'Subjects,' and sometimes as 'Categories,' creating possible confusion for patrons." from: Deborah Tomaras. "Problems with the Removal of \$v (Form Subdivisions) in 'Modern MARC': PCC At Large Virtual Conference, April 23-24, 2025."

https://docs.google.com/presentation/d/1KAFFU3pMmsX_SFUSnzLl68-XwxcywJloD-pbuW8n8wE/edit?usp=sharing

Catalogs with subject browse functionality would not be comprehensive anymore with \$v removal, severing links between older and newer works on the same topic. This means that patrons could not find new materials when searching using strings with \$v such as "Paris (France) \$v Guidebooks" (perhaps leading them to assume the library lacks new materials).

Potential cataloging and/or library staff workflow problems with \$v removal

- Form subdivisions (\$v) in subjects do not always have one-to-one genre replacements that catalogers can use.
 - Example: "\$v Comic books, strips, etc." correlates with "Graphic novels," "Comics (Graphic works)" and "Manga"
 - Example: "\$v Cases" correlates with "Court decisions and opinions,"
 "Administrative decisions," and "Casebooks (Law)"
- Current LCGFT is not robust enough to sufficiently replace all instances of \$v that catalogers might want to use.
 - Example: LCGFT does not allow audience-inclusive terms, so likely no replacements for "\$v Juvenile fiction" or "\$v Conversation and phrase books (for businesspeople)"
 - Example: LCGFT not likely to replace combination form/topical subdivisions, like
 "\$v Dictionaries \$x French, [Italian, etc.]" or "\$x Biography \$v Sources"

- Example: LCGFT not likely to replace form subdivisions that are modified with dates, such as "\$v Census, [date]"
- Because LCGFT does not allow encoding of multiple levels of genre to allow for different search comprehensiveness/specificity, assigned genres cannot recreate the collocation activity of subjects with \$v (i.e., library catalogers cannot assign "Paranormal romance fiction," "Romance fiction" AND "Fiction" to a romance novel).
 - Example: In place of "Werewolves \$v Fiction," a patron would need to search "Werewolves" and then guess which fictional genres and subgenres to select for faceting/narrowing to find them: "Horror fiction," "Science fiction," "Space operas (Fiction)," "Paranormal romance fiction," "Romance fiction," "Thrillers (Fiction)" and so on. Thus patrons could not easily find all desired works, and certainly not as easily as clicking on a single search string with \$v.
- Likely many libraries do not even know that the removal of \$v\$ is happening, which
 means they do not know to watch out for records lacking \$v\$, or consider local plans of
 action. Similarly, they might not know when the \$v\$ removal will begin, or how
 comprehensively, or how retroactively.
- Many libraries lack the resources, expertise or time to add back missing necessary metadata on a large scale.
 - Example: Copy catalogers would need to recognize records missing \$v information, and either supply it themselves or pass more records than previously to more experienced catalogers
 - This becomes more complicated for records that currently require doubled subjects with different \$v information to appropriately describe materials. For example: A fictional children's comic about dogs currently requires both "Dogs \$v Comic books, strips, etc." and "Dogs \$v Juvenile fiction." If a record omits \$v, and only creates a single heading for "Dogs," catalogers would need to be able to recognize that a second heading is needed, and not just a \$v appended to the single, existent heading
 - Example: Having to recreate missing \$v might mean spending more time perusing Subject Headings Manual instructions or subject authority files to find the correct \$v to use
 - Example: Libraries that rely on vendor-supplied metadata might incur extra costs if using the vendor to add back \$v information into record sets
- Many libraries lack the resources, expertise or time to configure their catalogs to search and display alternate fields for their patrons.
- Missing \$v and less discoverability might increase time spent by readers advisory staff to help patrons find materials (especially for catalogs that do not have genre search, genre faceting, or genre in the full record display)
- Missing \$v and less discoverability might affect circulation stats, particularly for collection materials that rely heavily on \$v for discoverability (fiction, comics, movies, TV shows, poetry, guidebooks, case studies, catalogs, etc.)
- Missing \$v might make it harder to do collection development (locating case studies, textbooks, reports, etc. for faculty purchases, assessing types of materials for weeding, creating LibGuides, etc.)

- Not all libraries are planning to transition to linked data. For these libraries, robust MARC
 records are still a necessity (i.e., the transition to linked data should not force
 insufficiently descriptive metadata on libraries who cannot or will not shift).
- Catalog records created before the advent of genre/form term vocabularies (GSAFD, LCGFT, etc.) often use just \$v subdivisions. It is not always possible to locate and retroactively assign genre/form terms to these comprehensively. This would make older materials inaccessible (for example, older exhibition catalogs in art libraries).
 - Example: "Nearly half of respondents (47%) did not retroactively add genre headings to older records, even when using supplemental vocabularies. A further 31% of respondents sometimes added genres retroactively. The majority only added genre headings if otherwise editing bibliographic records." from: Tomaras, Deborah, Allison Bailund, Joshua Bergmann, Abby Dover, Steven W. Holloway, and C. Rockelle Strader. "Genre Audiences, LCGFT and User Warrant: An Exploratory Study." Cataloging & Classification Quarterly (2025): 12. https://doi.org/10.1080/01639374.2025.2521297