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# Core Competencies for Cataloging and Metadata:

## Then & Now



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# AGENDA

- Background to 2017 document
  - 2022 Usage Survey Results
  - 2023 Revision
  - Questions for you
  - Q&A
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# BACKGROUND FOR ORIGINAL DOCUMENT

- Task Force forms with Baylor's Bruce Evans as chair in 2015
  - Research on job advertisements and literature
  - Drafts presented at two ALA meetings of this IG
  - Opened as Google Document for public comment in 2016
  - Final document submitted at Midwinter 2017 and was endorsed by ALCTS Executive Board
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## Core Competencies for Cataloging and Metadata Professional Librarians

### Cataloging Competencies Task Force

URI: <http://hdl.handle.net/11213/7853>

Date: 2017-01

#### Abstract:


This document defines competencies in broad terms to acknowledge the wide variety of work performed by cataloging and metadata professionals in libraries of all types and sizes, regardless of developments in a particular standard or technology. While a baseline of knowledge, skills, and behaviors for cataloging and metadata professional librarians is defined in this document, competence in cataloging and metadata is obtained over the course of an individual's career. This document is meant to supplement the American Library Association's Core Competencies of Librarianship, and as such, many general competencies of librarianship will not be listed here.

#### Description:

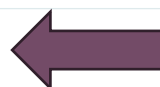
The document was drafted by the Cataloging Competencies Task Force of the ALCTS CaMMS Competencies and Education for a Career in Cataloging Interest Group. In preparation for this work, the Task Force conducted a literature review and a survey of position advertisements for professional catalogers. The Cataloging Competencies Task Force presented research results and preliminary thoughts concerning competencies to the community at its ALA Midwinter meeting in January 2016. After collecting feedback, the Task Force produced a draft, which was distributed in July 2016 for one month of public comment. This final document incorporates many of those recommendations.

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# “MAKING OF” THE COMPETENCIES



Evans, B., Snow, K., Shoemaker, E., McCourry, M., Yanos, A., Liss, J., & Rathbun-Grubb, S. (2018). Competencies through community engagement: Developing the *Core Competencies for Cataloging and Metadata Professional Librarians*. *Library Resources & Technical Services*, 62(4), 188-198.

<https://journals.ala.org/index.php/lrts/issue/view/689>

Evans, B., Liss, J., McCourry, M., Rathbun-Grubb, S., Shoemaker, E., Snow, K., & Yanos, A. (2023). Core Competencies for Cataloging and Metadata Professional Librarians: Assessment of Community Use and Recommendations for the Future of the Document. *Library Resources & Technical Services*, 67(4), 114-123.

<https://journals.ala.org/index.php/lrts/issue/view/861>

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# 2022 SURVEY RESULTS – DEMOGRAPHICS

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**Table 1.** Question 3: For which type of library or institution do you primarily work? (N = 428)

Answer Options	No. of Respondents	% of Respondents
Academic/Research Library	228	53.27
Public Library	113	26.40
Special Library (e.g., law, corporate)	23	5.37
School Library	23	5.37
Other (please explain)	20	4.67
LIS Program	11	2.57
Museum	7	1.64
Historical Society	2	0.47
Vendor/Publisher	1	0.23
Total	428	100.00

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**Table 2.** Question 4: What is your primary role at that library or institution? (N = 417)

Answer Options	No. of Respondents	% of Respondents
Professional cataloger/metadata librarian	172	41.25
Cataloging/metadata department manager	116	27.82
Senior library administrator	47	11.27
Paraprofessional cataloger/metadata specialist	29	6.95
Other library staff	22	5.28
Other (please explain)	19	4.56
LIS program educator	12	2.88
Total	417	100.00

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**Table 3.** Question 6: How have you used the Core Competencies? Check all that apply. (N = 337)

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<b>Answer Options</b>	<b>No. of Respondents</b>	<b>% of Respondents</b>
Personal professional development	102	30.27
Teaching/Training/Instruction	62	18.40
Preparing position descriptions	46	13.65
Institutional professional development	41	12.17
Evaluating employees	27	8.01
Curriculum development	22	6.53
Strategic planning	19	5.64
Other (please explain)	18	5.34
Total	337	100.00

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# 2022 SURVEY RESULTS – HIGH LEVEL

- Most questionnaire respondents felt that the 2017 *Core Competencies* were still valid and useful...assuming they knew about them.
- Suggestions:
  - Add IFLA's *Library Reference Model* (LRM) as an example (was not in existence at the time the *Core Competencies* document was adopted)
  - Mention *Cataloguing Code of Ethics* (once again, not in existence at the time the *Core Competencies* document was adopted)
  - Emphasize linked data more
  - Emphasize DEI and critical cataloging
  - Remove behavioral competencies



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# *Competencies* Revision

The original Task Force felt strongly that another group should revise the document and that it should have a clear “home.”

Though there was still no clear “home” for the document, in late 2022, the Core Metadata & Collections leadership team asked a Task Force member to lead the revision with a new group.

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# 2023/2024 REVISION

- Led by me (Karen Snow) and joined by Bobby Bothmann (Minnesota State University -Mankato), Staci Ross (University of Pittsburgh), Elizabeth Roke (Emory University), and Pamela Swaider (Indianapolis Public Library)
- Work began early 2023 - decided that no major revisions needed
- Completed in December 2023 and endorsed by the ALA Core Metadata & Collections Section leadership team

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# Core Competencies for Cataloging and Metadata Professional Librarians

Snow, Karen; Bothmann, Bobby; Ross, Staci; Russey Roke, Elizabeth; Swaidner, Pam;  
2017 ALCTS Cataloging Competencies Task Force

URI: <http://hdl.handle.net/11213/20799>

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## Abstract:

This document defines competencies in broad terms to acknowledge the wide variety of work performed by cataloging and metadata professionals in libraries of all types and sizes, regardless of developments in a particular standard or technology. While a baseline of knowledge, skills, and behaviors for cataloging and metadata professional librarians is defined in this document, competence in cataloging and metadata is obtained over the course of an individual's career. This document is meant to supplement the American Library Association's Core Competencies of Librarianship, and as such, many general competencies of librarianship will not be listed here. In early 2023, the Core Metadata & Collections Leadership Team asked former member of the Cataloging Competencies Task Force, Karen Snow, to lead an effort to revise the Core Competencies for Cataloging and Metadata Professional Librarians. The revision team worked during 2023 to update the 2017 document. Their effort was informed by 2022 survey research data collected by the Cataloging Competencies Task Force that spoke to the current usage of the Core Competencies document and potential changes and additions to the document, as stated by the cataloging and metadata community. Taking into consideration these changes and the aforementioned survey results, the revision team updated the entire original document to clarify language and incorporate competencies relating to artificial intelligence and large language models, emphasize ethics, and move the examples to an appendix for easier updating over time.

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# 2023 REVISION

- Three main competencies areas remain intact: Knowledge, Skills/Abilities, Behavioral
- Several revision team members felt strongly about removing the examples; concerns over endorsement/dating of document
- Still saw value in keeping examples, which were moved to an appendix
- Main changes: clarifying and updating the language of the competencies
  - Measurability has been a key concern

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# EXAMPLE – 2017 VERSION

## **Knowledge of systems and technology**

- Understands indexing and database structure
  - Examples: understands utility of authorized text strings and unique identifiers for indexing and referential functionality
- Understands library services platforms/library management systems and/or institutional repository and digital library management systems
  - Examples: Sierra, Alma, Symphony, Koha, WorldShare Management Services, CONTENTdm, Islandora, DSpace
- Understands the nature and function of cooperative bibliographic databases
  - Examples: OCLC WorldCat, Ill SkyRiver
- Understands methods and approaches for metadata creation, editing, analysis, and transformation
  - Examples: Using tools such as OCLC Connexion, oXygen XML Editor, MarcEdit, OpenRefine, XML Notepad, XSLT

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# EXAMPLE – 2023 REVISION

## Knowledge of systems and technology

- Understands how metadata is stored, processed, and retrieved
  - Indexing and database structure
  - Relationship of cataloging outputs to discovery and access use cases
- Understands the function and structure of library data management platforms, such as library management systems (LMS), institutional repositories (IR), and content management systems
- Understands the nature and function of cooperative databases and initiatives

## Appendix

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The encoding standards, metadata schemes, and content standards listed below are intended to be illustrative examples of some of the common types of standards in use in libraries and cultural heritage institutions in the United States. Metadata professionals should understand the use cases, limitations, and evolution of these standards, not just their direct application. For more information about the technical systems used in libraries to capture and manage metadata, see the annual Library Systems Report published by ALA. The 2023 version is here:

<https://americanlibrariesmagazine.org/2023/05/01/2023-library-systems-report/>

## Examples Pages 12-13

### **Data content standards**

*Content standards provide guidelines that describe how textual values in metadata should be structured, providing a standard to guide metadata creation and cataloging practices. Often described as cataloging rules and codes, content standards normalize the values that appear in metadata and include guidelines for sources of information and how data values should be formatted.*

- Anglo-American Cataloguing Rules, 2nd edition (AACR2)
- Cataloging Cultural Objects (CCO)
- Describing Archives: A Content Standard (DACS)
- Resource Description and Access (RDA)
- Rules for Archival Description (RAD)

### **Data structure standards**

*Data structure standards or metadata schemas describe the element sets for a particular descriptive domain.*

- Bibliographic Framework Initiative (BIBFRAME)
  - Categories for the Description of Works of Art (CDWA)
  - Dublin Core (DC)
  - Encoded Archival Description (EAD)
  - Metadata Object Description Schema (MODS)
  - Machine-Readable Cataloging (MARC)
  - Visual Resources Association (VRA Core)
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# 2023 REVISION - ADDITIONS

- Greater emphasis on ethics
  - The *Cataloguing Code of Ethics* was released since the publication of 2017 *Competencies*

- Inclusion of artificial intelligence

“Understands the impact, limitations, and possible usage of artificial intelligence (AI) applications and large language models (LLM)” (page 7)



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## From ChatGPT to CatGPT

The Implications of Artificial Intelligence on Library Cataloging

**Richard Brzustowicz**

Carlow University

<https://orcid.org/0009-0003-6143-9631>

**DOI:** <https://doi.org/10.5860/ital.v42i3.16295>

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# QUESTIONS FOR \*YOU\*!

- Have you used the 2017 *Core Competencies* document? If so, how?
- How should artificial intelligence fit into a cataloging & metadata competencies document?
- Is a 5-year revision cycle for the *Competencies* sufficient?
- Thinking about your work environment, what are the implications of *knowing* about the Competencies vs. *applying* them?
- Are there ways to improve the *Core Competencies* document to make it more useful?

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# Questions for us?

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