

Core Competencies for Cataloging and Metadata Professional Librarians

Assessment of Community Use and Recommendations for the Future of the Document

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The Association for Library Collections & Technical Services (ALCTS) Board of Directors approved the Core Competencies for Cataloging and Metadata Professional Librarians, hereafter referred to as the “Core Competencies,” in January 2017. The Core Competencies lists the skills required of professionals performing cataloging and metadata work in libraries of all types. In the six years since the document’s release, the cataloging and metadata community has adopted new cataloging standards, experimented with new tools, and engaged in conversations and reparative efforts around inclusive metadata. In this paper, we, the authors of the Core Competencies, report the results of our survey research that assessed the current use of the document within the cataloging and metadata community and solicited comments on ways in which the document might be revised. We conclude with recommendations for immediate changes to the document, and for its future use and maintenance.

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In January 2017, the Association for Library Collections & Technical Services (ALCTS) Board of Directors approved the *Core Competencies for Cataloging and Metadata Professional Librarians* (hereafter *Core Competencies*).¹ The *Core Competencies* was written by the authors of this article in their capacity as the Cataloging Competencies Task Force, formed out of the Competencies and Education for a Career in Cataloging Interest Group of ALCTS, in consultation with the community of cataloging and metadata librarians within ALCTS. The *Core Competencies* document “defines a baseline of core competencies for library and information science (LIS) professionals in the cataloging and metadata field.”² We used a community-centric approach to discern the knowledge, skills, abilities, and personal characteristics required for work as a cataloging and metadata professional librarian, and to compose the final document. We described the process of collecting information, soliciting feedback, and refining the document in an article published in 2018, so we do not plan to revisit that process here.³ Instead, the following article

will present the results of a survey that collected information about the *Core Competencies*. This includes discussing changes to the profession since its release, and exploring next steps for the document.

Background

In the six years since the *Core Competencies* document's release, there have been several updates and additions to the cataloging and metadata standards, models, and best practices generally accepted within the field. The RDA Steering Committee (RSC) initiated the RDA Toolkit Restructure and Redesign (3R) Project in 2017, concluding that project in 2020. In 2018, the International Federation of Library Associations and Institutions (IFLA) published the *IFLA Library Reference Model: A Conceptual Model for Bibliographic Information* (IFLA LRM). In 2020, the American Library Association (ALA) replaced three of its divisions—ALCTS, the Library Information Technology Association (LITA), and the Library Leadership and Management Association (LLAMA)—with a new division, Core: Leadership, Infrastructure, Futures (hereafter referred to as ALA Core).⁴ In 2021, the ALA Core Board of Directors endorsed the *Cataloguing Code of Ethics*, a document produced by the Cataloging Ethics Steering Committee. The committee was composed of a group of representatives from ALA Core, the Canadian Federation of Library Associations-Fédération canadienne des associations de bibliothèques (CFLA-FCAB), and the United Kingdom's Chartered Institute of Library and Information Professionals (CILIP). CILIP endorsed the *Cataloguing Code of Ethics* in 2022.

These six intervening years have also seen a number of collaborative cataloging- and metadata-related projects between librarians, developers, and vendors. The Andrew W. Mellon Foundation continued its funding for the Linked Data for Production (LD4P) project. Cataloging and metadata professionals collaborated with vendors on the development of tools such as FOLIO, Share-VDE, and Sinopia. In addition, the cataloging and metadata community sought collaborations with library-adjacent information communities. The Program for Cooperative Cataloging (PCC) launched several exploratory efforts, including the PCC ISNI Pilot and the PCC Wikidata Pilot, both of which sought to encourage catalogers to enrich identity registries outside of the library domain.

In recent years, cataloging and metadata community members have collaborated extensively both inside and outside of formal editorial bodies and professional associations to affect change in the inclusivity of cultural heritage data. Critical cataloging, or CritCat, which is defined by Watson as “a social justice oriented style of radical cataloging that places an emphasis on radical empathy, outreach work, and

recognizes the importance of information maintenance and care,” has evolved from a social media hashtag into a theoretical framework cited in library science literature.⁵ Online discussions loosely organized under the CritCat banner have helped fuel initiatives such as the Cataloging Lab.⁶ Through the Cataloging Lab, catalogers collaborate on proposals to change biased Library of Congress Subject Headings and Library of Congress Classification numbers, and to enhance authority records in the Library of Congress Name Authority File. Publications such as those issued by the Archives for Black Lives in Philadelphia have further guided librarians on the path toward reparative cataloging and metadata endeavors, particularly in the arena of addressing biased and harmful description.⁷

The accumulation of these changes in cataloging and metadata standards and tools—coupled with the rise in activity aimed toward correcting past injustices—have, in our opinion, had a significant impact on the nature of the work of cataloging and metadata librarians. Understanding that these changes in the profession may have also changed what competencies are required by its members, the Cataloging Competencies Task Force discerned the need for a study of the profession's use of the *Core Competencies* to date, and of the need for changes and additions that may have arisen since the document's publication.

It became clear to us too, that whatever changes might be needed at present would not last if the document is to remain relevant. Competencies documents and their authors, primarily members of professional association divisions and committees, do not always indicate a formal plan or schedule for revision, and the *Core Competencies* document shares this deficiency. The continuous technological and procedural changes associated with cataloging and metadata creation necessitate the regular update of any published set of competencies, but the coordination of that process requires careful planning.

Before suggesting any plan for revision, we wanted to assess whether the document was being used or referenced, by whom, and for what purposes; we also needed to solicit the feedback of users from a variety of stakeholder groups, including practitioners, educators, researchers, etc. Consistent with the recommendations of Lester and Van Fleet, we sought to “review [the] statements for continued currency and relevance . . . afford[ing] useful opportunities for fruitful dialogue—and just maybe, a lessening of tension between [educators and practitioners].”⁸

We were able to begin some of the assessment of the use of the document with existing data. From usage statistics reports retrieved from the ALA Institutional Repository on May 31, 2022, we learned that the *Core Competencies* document has been viewed and/or downloaded 41,027 times since publication, and the repository's landing page for the document was visited 22,356 times.⁹ The majority (67 percent) of

views of the document originated in the United States, and over 80 percent of those accessing the document were located in the United States, Canada, Australia, and the United Kingdom. While this quantitative data on how often the *Core Competencies* document had been accessed showed us that it was at least being considered, we realized that qualitative data was needed to fully assess the usage of the document. We determined that a survey regarding the use of the document was required, and that survey might also be used to illuminate ways in which the document might be improved.

Literature Review

Competency documents are fairly common within the library field. The American Library Association (ALA) has published its *Core Competencies of Librarianship* (2022), a revision of its 2009 document of the same name. The ALA Committee on Accreditation uses this document, among others, to evaluate LIS master's degree programs for accreditation, evaluating the extent to which these competencies, as well as other specialized competencies statements, are reflected in and met by the curricula and other preparatory activities provided by programs. Similarly, the ALA/American Association of School Librarians/Council for the Accreditation of Educator Preparation's *School Librarian Preparation Standards* provide accreditation standards for programs, rather than standards for credentialing of individual librarians.¹⁰

The 2022 version of ALA's *Core Competencies* states that the competencies "reflect basic knowledge gained through LIS education, job on-boarding, and ongoing professional development early in a library career. It is essential that library professionals working throughout their careers in school, academic, public, special, and governmental libraries be life-long learners to acquire specialized and advanced knowledge beyond those specified in this *Core Competencies* document"¹¹ To that end, various divisions and related professional associations have developed specialized competency documents and ALA has published them on the Education and Careers section of its website.¹² These competency standards vary widely among the organizations and rarely indicate any prescribed schedule for review and revision.

A search of the published literature in library and information science databases also did not produce evidence on the revision processes of these competency documents. Within the field of librarianship, authors have discussed the need for competency documents and have described the process by which the documents are created, but do not address specific plans for regular updates.¹³ This is not surprising given that these documents contain recommendations rather than mandates, and there are no post-graduation continuing credentialing agencies for professional librarians outside of state level certification requirements for school librarians' professional development.

We turned to literature from outside of the library context to give us insight into how other competency document revision projects have been handled. It is much more common to see articles from the medical professions that focus on updating and maintaining current competency standards, given the need for the strict licensing requirements that librarianship does not require. Pediatric physical therapy faculty Chiarello and Effgen updated competencies first written in 1990 for that discipline using a multi-pronged process for data gathering and document drafting.¹⁴ In collaboration with their faculty, Chiarello and Effgen drafted a revision based on the most current legal frameworks, medical terminology, "evidence-based practice," standards of affiliated disciplines, and focus groups with parents, which was then reviewed and further modified by practicing professionals, educators, and researchers. The authors also updated the 1987 *Competencies for School Physical Therapists* using the same basic methodology, but with the substitution of focus groups of physical therapists working in schools.¹⁵

The International Confederation of Midwives (ICM) based their revision plan of the *ICM Essential Competencies* on the standards recommended by the National Commission for Certifying Agencies, "a timeline consistent with global practice, that recommends that task analyses . . . be conducted every 5–7 years, but more often if new research evidence is rapidly emerging that is likely to change the nature of the profession that is being studied" and the ICM's policy development and review timeline.¹⁶ Their revision emerged from a modified Delphi study of over 300 midwifery experts who endorsed particular competencies. Similarly, the Oncology Nursing Society's *Oncology Nurse Navigator Core Competencies* were updated after four years through a process of gathering feedback from field experts and practitioners as well as data from a systematic review of the literature.¹⁷

In the United Kingdom the *Competence Framework for Orthopaedic and Trauma Nurses* has been updated regularly on a seven-year schedule, the most recent of which was written collaboratively by disciplinary experts and practitioners in the field. Notably, the team restructured the document as well, added a learning contract, and emphasized a follow up plan for publicizing and evaluating the competencies.¹⁸

The investigation of healthcare competency document revision informed our research in that we recognized the need for a systematic approach to revision and determined that a first step included investigating the document's usage patterns and collecting initial feedback on its contents from cataloging and metadata practitioners and educators. Any approach to scheduling, managing, and implementing a revision process will need to be methodologically sound and comprehensive, and conducting survey research would allow us to get initial reactions to inform our recommendations for creating the next version of the *Core Competencies*.

Methodology

In order to determine usage trends and perceptions about the *Core Competencies* among practitioners and educators, we developed an online questionnaire that was available for completion over three weeks during January and February of 2022 on the Qualtrics platform. The survey instrument, included as an Appendix to this article, consisted of four closed- and two open-ended questions on type of workplace, job role, whether the respondent had used the *Core Competencies* and for what purposes, perceptions of what needed to be revised, removed from, or added to the document, and general open text comments. We wanted the survey to reveal as much information as possible about the community use and perceptions of the *Core Competencies*, but without discouraging participation by making it too lengthy. We also received IRB approval prior to sending it out. Participants were recruited to take the survey using an invitation emailed to a wide variety of cataloging, metadata, and general library-related email discussion lists and message boards, including OCLC-CAT, OLAC-L, MOUG-L, MLA-L, RADCAT, DCRM-L, RMBS, ARLIS, BIBFRAME, AUTOCAT, EDUCAT, ALISE, LM-NET, PUBLIB, JESSE, OVGTSL, INLIBRARIES, INPUBLIB, MICHLIB-L, MI-ALA-NEWS, ALA Connect interest groups, and the Troublesome Catalogers and Metadata Fairies Facebook group page.

Data were analyzed using tools provided within the Qualtrics platform, and content analysis techniques were used to examine and code open-ended responses for thematic categories. Coding was performed by individual members of the group and then discussed to resolve any divergent analyses. Additional cross tabulations were conducted to investigate group differences by workplace types and job roles.

Results

A total of 434 respondents started the survey, though not all respondents answered every question. Our discussion highlights the major themes that emerged in those responses.

Library/Institution Type

Of the 428 respondents to the question, “For which type of library or institution do you primarily work?,” 53 percent work for academic libraries. Public library employees represented 26 percent of the total number of respondents, and school library and special library employees followed at 5 percent each. LIS program employees made up 3 percent of respondents, museum employees represented 2 percent, and historical society and vendor employees came in at less than 1 percent each. The “Other” category was chosen by the remaining 5 percent of respondents, which included those

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

who work in a consortium, government libraries, archives, a curriculum library, and those who are currently unemployed or retired. Two of the “Other” respondents fit our intended definition of the vendor category, bringing that total to three (still less than 1 percent of the total), and three were employed by LIS programs, bringing that total to 14 (still 3 percent of the total). See table 1 for a breakdown of respondent library/institution types.

Library/Institution Role

In answer to the question, “What is your primary role at that library or institution?,” 41 percent identified themselves as “Professional cataloger/metadata librarian,” 28 percent as “Cataloging/metadata department manager,” and 11 percent as “Senior library administrator.” “Paraprofessional cataloger/metadata specialist” was a fairly well-represented category at 7 percent, and 3 percent identified as an “LIS program educator.” In the categories of “Other library staff” and “Other (please explain),” there were 5 percent each, with archives being identified most often as the primary role, and various acquisitions and systems duties being named as well. See table 2 for a breakdown of respondent library/institution roles.

Core Competencies Usage

Of the 399 respondents to the question, “Have you used the *Core Competencies* in your work? (select “Yes” or “No”),” 65 percent responded “No.” There was no particular institution type or job role that skewed more heavily toward a “No” response; however, those working for special libraries, museums, and vendors chose a “No” response more frequently than those employed in academic, public, and school libraries. Seventy percent of respondents identifying as LIS educators selected “Yes.”

For the question “How have you used the *Core Competencies*? Check all that apply,” there were 337 usable responses. Respondents were provided a list of use cases and asked to select all that apply, with the option of checking “Other” and supplying additional use cases. Two unusable responses indicated that respondents had not used the *Core Competencies*. Respondents most often indicated that they used the document for “Personal professional development” (30 percent). “Teaching/Training/Instruction” was the second most selected use case (18 percent), followed by “Preparing position descriptions” (14 percent), and “Institutional professional development” (12 percent). Answer options totaling less than 10 percent of responses included “Evaluating employees” (8 percent), “Curriculum development” (7 percent), “Strategic planning” (6 percent), and “Other” (5 percent).

An evaluation of the write-in options for those respondents who selected “Other” revealed six additional use cases. Three respondents said they used the Core Competencies to manage their professional portfolios and consulted the document to prepare curricula vitae or tenure dossiers. Three respondents found the Core Competencies useful for mentoring MLIS students and interns. Two respondents used the Core Competencies for recruiting employees and preparing interview questions. Three further use cases were identified, with each use being cited by only one respondent: LIS program accreditation, graduate studies, and software development. See table 3 for a breakdown of how participants have used the Core Competencies.

Suggestions for Revisions

There were eighty-nine free text responses to the question “What competencies need to be revised, removed, or added, if any?” The responses were categorized into the following themes: “change/add/remove examples provided in the document,” “change/add/remove individual competencies,” “other,” “I don’t know,” or “nothing needs to be changed.” The most common recommendation was to add a competency requiring knowledge of IFLA’s *Library Reference Model*, which was developed in 2018 after the adoption of the *Core Competencies*.¹⁹ The other most common suggestions included emphasizing linked data knowledge, removing the behavioral competencies section, and including competencies related to diversity, equity, and inclusion (DEI) and critical cataloging.

Respondents recommended the addition of general competencies related to advocacy, leadership, and budgets, along with an understanding of the concept of neutrality and familiarity with the *Cataloguing Code of Ethics*.²⁰ It was also proposed that later versions of the document include updated references to specific examples of library services platforms, vendors, proprietary technical applications, or cloud services, and it was noted that technical

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

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

Answer Options	No. of Respondents	% of Respondents
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

data manipulation competencies should be emphasized for data interoperability between different systems and applications. Respondents suggested the addition of disambiguation and genrefication to cataloging skills, as well as evaluation of record quality—particularly of vendor-supplied records—and an understanding of the impact of record quality on user services. It was suggested that competencies related to metadata work should include specific mentions of element sets, schema mapping, application profiles, and specialty data environments such as institutional or data repositories. One respondent advocated for the removal of “understands historical context for current metadata practices.” Suggestions unrelated to the content of the document included increasing publicity and awareness of its existence, involving international partners in any revision efforts, improving readability, format, and accessibility, and adding an appendix with links to cataloging and metadata resources.

Other Comments

There were fifty-six free text responses to the question, “Is there anything else you would like to add about the Competencies that we haven’t asked?” Twenty-four of these responses had nothing to add (such as “I don’t know” or “Not at this time”), but thirty-two respondents offered more substantive comments. Ten of those responses advocated for various revisions to the *Core Competencies* document. The suggested revisions and additions mainly fell into the same themes discussed above for the survey question, “What competencies need to be revised, removed, or added, if any?” These included suggestions to make the *Core Competencies* more internationally applicable, to address DEI and cataloging ethics issues more explicitly, and to diversify the group responsible for the *Core Competencies* so that the membership more accurately reflects the wide range of libraries and library users.

Another major theme of the responses to this question concerned reasons why the respondents or their organizations have not used the *Core Competencies* document. The most common reason given was that some respondents were not aware of the existence of the *Core Competencies* before taking the survey. Most of these respondents recommended promoting the competencies more widely. Other reasons provided by respondents fell into two subcategories: (1) challenges and barriers to developing the skills and knowledge described in the *Core Competencies*, and (2) why the *Core Competencies* were not useful, applicable, or practical for the respondent’s particular organization or circumstances. One respondent suggested that the *Core Competencies* were challenging to attain because they contained a wide range of skills, such as managing a project at one extreme and applying cataloging principles at the other. Another respondent noted that while the document would be useful for training a new cataloger, the overall content is so broad they are not sure who the audience is and would like to know more about why the *Core Competencies* were created. Other comments noted that a lack of funding for training, professional development, and subscription-based cataloging resources (such as the *RDA Toolkit*) posed a significant barrier to developing the required skills and knowledge. One respondent wrote, “The competencies state that they are directed towards metadata professionals and perhaps that is why they haven’t been used in my system, which is a public library consortium where the vast majority of our cataloging work is copy cataloging done by paraprofessionals.” Lastly, seven respondents commented that they found the *Core Competencies* to be useful. One respondent stated, “Especially like the behavioral competencies,” while another commented, “I have always liked the use of examples” and noted that “the document is useful for describing the types of tasks, broadly, to others.”

Discussion

As is clear above, we received copious amounts of feedback that will prove useful in revising and maintaining the *Core Competencies*. In this section, we would like to discuss a few of the prominent findings and themes from the survey results.

First, we must highlight the fact that many respondents thought the *Core Competencies* required little or no revision, as shown in responses to the free text questions. Sample comments included: “I don’t see anything that I would say needs to be changed,” “These look very useful and applicable,” “I can’t think of anything,” and many “no/nothing” statements. Many other responses suggested that the *Core Competencies* only needed minor revisions. The responses as a whole suggest that the *Core Competencies* document has largely stood the test of time and that the contents remain relevant to those who are aware it exists. The responses to the question about how the *Core Competencies* are used demonstrate that it has many applications in professional development, administration, hiring, and LIS education.

Unfortunately, the numerous responses of those who were unaware of the *Core Competencies* prior to completing the survey provide an unambiguous, unequivocal message regarding the need to greatly improve the promotion of the *Core Competencies*. The *Core Competencies* document cannot be relevant or useful if the broader cataloging and metadata profession does not know it exists.

Respondents were also clear that it is important to emphasize competencies related to DEI and to critical cataloging. The need for reparative cataloging in view of numerous controlled vocabularies containing Western-centric, colonial language in reference to underrepresented groups has been rightly called out and highlighted in recent times,²¹ and the document should reflect that fact. Including a competency, or competencies, with examples that refer to the *Cataloguing Code of Ethics* will address this concern to some extent. Additionally, a review of the existing competencies to ensure that these themes are applied as appropriate throughout the document would be worthwhile.

Some survey respondents suggested revisions that reflect additional developments in the cataloging and metadata profession that have occurred since the document was originally written and approved. Examples include requiring knowledge of IFLA’s *Library Reference Model*; emphasizing linked data; updating references to any specific examples of library services platforms, vendors, proprietary technical applications or cloud services; and adding the concepts of disambiguation and genrefication in authority work.

Additionally, some suggested revisions encompass details that the *Core Competencies* did not cover explicitly, such as evaluation of record quality (particularly of vendor-supplied records) and an understanding of the impact of quality on user services; technical data manipulation competencies in

relation to data interoperability between different systems and applications; and metadata-specific competencies such as specific mentions of element sets, schema mapping, application profiles, and specialty data environments such as institutional or data repositories. Many of these areas were suggested in the original document.

The suggested revisions or additions discussed thus far are fairly straightforward and uncontroversial. There were several suggestions, though, that demand further discussion and reflection within the community and by those who will be involved in future revision of the *Core Competencies*. For example, in response to the question, “Is there anything else you would like to add about the Competencies that we haven’t asked?” a number of comments indicated perceived barriers to use, a lack of applicability, or insurmountable hurdles to developing the skills and knowledge listed as competencies. Some of these comments reflected the differences in scope and responsibilities across cataloging and metadata assignments and institutional types. Moreover, some respondents are employed at institutions that lack funding for training, professional development, and subscription-based cataloging resources.

We acknowledge these barriers to use and other difficulties, and we realize that some of the competencies may be more useful for some areas of the profession than others. We would encourage the community to see the competencies as a guide towards what a robust suite of cataloging and metadata knowledge and skills would look like, rather than as a mandate for what knowledge and skills all cataloging and metadata professionals should possess. Additionally, there has been discussion off and on about whether there should be a separate competencies document for copy catalogers or paraprofessionals, as well as for metadata librarians. We invite community discussion regarding whether one revised *Core Competencies* document can reasonably cover all imaginable levels of cataloging and metadata activities at all types of libraries.

A number of responses recommended reaching out to other organizations, such as CILIP or IFLA, to collaborate on making the *Core Competencies* apply universally throughout the cataloging and metadata profession. We agree that there is considerable merit to this idea, as it could potentially facilitate a greater number of practitioners involved in the *Core Competencies* development, thereby increasing the utility of a revised document to a larger swath of the profession.

Fortunately, the topic of internationalization of cataloging standards was the focus of the August 31, 2022, IFLA Subject Analysis and Access (SAA) Section webinar “Knowledge Organization Competencies and Skills.” Panelists noted that formulating international competencies to make them broadly applicable across varying national cataloging communities would be challenging.²² So perhaps a more practical approach would be to continue collaborations, such as those

represented by the IFLA webinar, across these various cataloging communities around the world.

And finally, some respondents recommended removing the behavioral competencies, while others reported appreciating their inclusion. This was not surprising, as we received similar feedback from the community while we were creating the *Core Competencies* document. The general argument against including them is that they do not deal with knowledge specifically concerning cataloging and metadata tasks and aptitudes. In response, we, as well as many survey respondents, feel that the behavioral competencies comprise an essential skill set for any information professional who wishes to be successful. We believe that their inclusion is vital. Indeed, at the IFLA SAA webinar referenced earlier, it was made clear that CILIP’s cataloging competencies, known as the Professional Knowledge and Skills Base, contain a broad category of competencies referred to as “Generic Skills.” Upon review, we have determined that the skills in this category correspond with those in the *Core Competencies*’ behavioral competencies. Moreover, since one of the responses to the survey question about revisions was a suggestion to add general competencies related to advocacy, leadership, and budgets, we feel that there is support for competencies that are more holistic in nature. We advocate for preserving the presence of the behavioral competencies in the document.

Conclusion

It is heartening to know that the *Core Competencies* document has been put to good use in the six years since it was released. From professional development to preparing job position descriptions, the *Core Competencies* has provided practitioners, educators, administrators, and others clear guidance on what is considered foundational knowledge, skills, and behavior in cataloging and metadata work. Nevertheless, while the survey results gave affirmation of its endurance during a time of substantial change in the cataloging and metadata world, they also provided much-needed data on the limits of the *Core Competencies*’ reach, and a guide to the work required to ensure the continued relevance and expanded use of the document.

We highly recommend that the Cataloging Competencies Task Force not be the group to revise the document. We are proud of the document and the collaboration with the cataloging and metadata community that produced it, but it is time to hand the revision work off to another group. As of this writing, there is some work being done through the Metadata and Collection Section of ALA Core to establish a revision structure, and one member of this group is leading that effort. This new group should take a fresh look at the *Core Competencies* as a living document and revise it in consultation with the cataloging and metadata community. This will ensure

that the document has a “home” and is reviewed on a regular cycle. The overlap in participation from a Cataloging Competencies Task Force member is important for the continuity and currency of the document with the additional benefit of knowledge of the project’s history. At a bare minimum, the examples should be reviewed and updated regularly, but the new project team should consider the issues raised above in the Discussion section—such as including behavioral competencies—that may impact the entire focus and structure of the document.

A well-crafted and potentially useful document is rendered useless if few people know about it. We recommend that new efforts to create professional documents learn from our lapse in advertising the document effectively. The

Cataloging Ethics Steering Committee has provided a model for raising awareness of professional documents, having created a website homebase for the *Cataloguing Code of Ethics* that allows for the sharing and promotion of information on the entire process of creating the document, the names of those involved, the various drafts, and the final version of the document.²³ Intentional, multimodal, inclusive, and persistent engagement with various sectors of the cataloging and metadata community is key to raising awareness, as well as gathering valuable feedback and buy-in. We hope the *Core Competencies* document continues to inform and benefit cataloging and metadata practice and education now and through many iterations to come.

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Appendix. Survey

Purpose of the Research

The purpose of our survey study will be to ascertain how widely and in what ways the *Core Competencies for Cataloging and Metadata Professional Librarians* are currently being used in the library profession. The results of the survey will not only help us understand how widely and in what ways they are being used, but also what needs to be changed or added in the next iteration of the document.

Study Activities

Survey of the cataloging and metadata library community.

Risks and Benefits

Risks should be minimal, and potential benefits include the knowledge that participants are contributing to the corpus of professional knowledge.

Confidentiality

Study investigators will not collect information that personally identifies those who complete the survey. Only aggregated data will be collected. Data will be kept in the survey software, and will only be accessible to study investigators. Data analysis using software programs (such as Excel) will be conducted only on the personal or work computers that are password protected and/or inaccessible to anyone other than the study investigators. The confidentiality of participant information will be maintained in all publications and presentations resulting from this study. Research records will be maintained by the principal and co-investigators on their respective computers for five years past the end of the study and then destroyed (i.e., the data will be deleted).

Compensation

No compensation is offered for the completion of this survey.

Questions or Concerns about This Research Study

Since this study carries minimal risk for participants, any problems will be monitored by the principal investigator in collaboration with the co-investigators. The same personnel will assess actions needed to ameliorate or manage the problems. Study participants will be encouraged to contact the Baylor IRB Chair (Jessica Trevino: irb@baylor.edu) if they have any concerns about the study plan or procedures, but feel uncomfortable reaching out to the principal and co-investigators. [The software numbered the preceding text as "Question 1" of the survey.]

Question 2

Consent to survey participation

- I agree
- I do not agree

Question 3

For which type of library or institution do you primarily work? (select one)

- Academic/Research Library
- Public Library
- School Library
- Special Library (e.g., law, corporate)

- Museum
- Historical Society
- LIS Program
- Vendor/Publisher
- Other (please explain)

Question 4

What is your primary role at that library or institution?
(select one)

- Senior library administrator
- Cataloging/metadata department manager
- Professional cataloger/metadata librarian
- Paraprofessional cataloger/metadata specialist
- Other library staff
- LIS program educator
- Other (please explain)

Question 5

Have you used the Core Competencies in your work?

- Yes
- No

Question 6

How have you used the Core Competencies? Check all that apply.

- Personal professional development
- Institutional professional development
- Preparing position descriptions
- Evaluating employees
- Teaching/Training/Instruction
- Curriculum development
- Strategic planning
- Other (please explain)

Question 7

What competencies need to be revised, removed, or added, if any?

[Free text response]

Question 8

Is there anything else you would like to add about the Competencies that we haven't asked?

[Free text response]