Notes on Operations
Competencies through Community Engagement

Developing the *Core Competencies for Cataloging and Metadata Professional Librarians*

Bruce J. Evans, Karen Snow, Elizabeth Shoemaker, Maurine McCourry, Allison Yanos, Jennifer A. Liss, and Susan Rathbun-Grubb

Bruce J. Evans (bruceevans@baylor.edu) is Assistant Director for Library Collections Services, Cataloging and Metadata, Baylor University Libraries, **Jennifer A. Liss** (jaliss@indiana.edu) is Head, Monographic Image Cataloging, Indiana University Libraries, **Maurine McCourry** (rnmccomry@hillsdale.edu) is Technical Services Librarian, Hillsdale College, Mossey Library. **Susan Rathbun-Grubb** (srathbun@mailbox.sc.edu) is Associate Professor, School of Library and Information Science, University of South Carolina. **Elizabeth Shoemaker** (elizabeth.shoemaker@demory.edu) is a Rare Book Cataloger, Stuart A. Rose Manuscript, Archives, and Rare Book Library, Emory University. **Karen Snow** (ksnow@dorn.edu) is Associate Professor, School oflnformation Studies, Dominican University. **Allison Yanos** (allisonyanos@baylor.edu) is Catalog and Database Maintenance Librarian, Baylor University Libraries.

In 2015 the Association for Library Collections and Technical Services Cataloging and Metadata Management Section (ALCTS CaMMS) Competencies for a Career in Cataloging Interest Group (CECCIG) charged a task force to create a core competencies document for catalogers. The process leading to the final document, the Core Competencies for Cataloging and Metadata Professional Librarians, *involved researching the use of competencies documents, envisioning an accessible final product, and engaging in collaborative writing. Additionally, the task force took certain measures to solicit and incorporate feedback from the cataloging community throughout the entire process. The Competencies document was approved by the ALCTS Board of Directors in January 2017. Task force members who were involved in the final stages of the document's creation detail their processes and purposes in this paper and provide recommendations for groups approaching similar tasks.*

In 2015, the Association for Library Collections and Technical Services Cataloging and Metadata Management Section (ALCTS CaMMS) Competencies for a Career in Cataloging Interest Group (CECCIG) charged a task force to create a core competencies document for catalogers. The initial charge asked the task force to "enumerat[e] the skills and knowledge required for a career in cataloging for use by cataloging practitioners and educators."[1] The process that the task force followed was ultimately successful, and the final draft of the *Core Competencies for Cataloging and Metadata Professional Librarians* was formally approved by the ALCTS Board of Directors and made publicly available via the American Library Association Institutional Repository (ALAIR) in January 2017.[2] The task force conducted research into the use of competencies documents, envisioned community needs and requirements for such a document, undertook collaborative writing to draft the document, and solicited and incorporated feedback from the cataloging community throughout the process of creating the final product.

Through its research, the task force found that competencies documents exist for many professions, and librarianship has developed several, including a *Core Competences of Librarianship* adopted by the American Library Association (ALA) in 2009. Although that document addresses some competencies needed by catalogers, by 2015 it had become clear to the CECCIG that there

was a strong need for a similar document specifically for catalogers and that the cataloging community desired such a tool. The task force appointed to create this cataloging competencies document successfully involved the broader cataloging and metadata community in the process of collaborative research and writing and learned a great deal about facilitating such involvement. By detailing this process and its outcomes, the task force hopes to aid other groups in writing competencies documents and to offer suggestions for successful collaboration that effectively engages the community for which the document is written.

Literature Review

The development of the *Core Competencies* document was informed by an extensive review of relevant literature. First, the task force found it helpful to define what is meant by "competencies" in this context. Discussion of core competencies in library literature grew out of a broader effort to define "competency" in the early 1990s, beginning with Prahalad and Hamel's paper in the *Harvard Business Review* on core competencies for organizations.[3] Their definition of "competency" focused largely on the resources, skills, and techniques needed to distinguish an organization from its competitors.[4] Within the library and information sciences (LIS) profession, "competency" refers primarily to an individual's characteristics, not those of an organization. Dole notes "there is no standard universally accepted definition of core competencies in libraries," but there are common threads.[5] Fisher asserts that one should not view competencies monolithically, but as composed of three main categories: professional, personal, and educational.[6] Professional competencies are "occupation-related knowledge and skills that make one technically proficient at the tasks that comprise one's job and are needed for success in a particular work setting."[7] Personal competencies are "individual traits, attitudes, and behaviors needed for success in almost any venue."[8] Educational competencies are "those skills, traits, and attitudes that result from studying a body of knowledge on a given topic as one learns how to learn."[9] Fisher emphasizes that these competencies will evolve over time as jobs and knowledge adapt to continually changing information environments.

Others have defined "competencies" using many of the same descriptors as Fisher but have not broken down their definitions into discreet categories. For example, the European Council of Information Associations defines "competency" as "the set of skills necessary to perform professional activity and the understanding of the professional behaviour which encompasses them."[10] Competencies should be observable and therefore analyzable in some way. Dole, Hurych, and Liebst define "competencies" narrowly as a "specific range of skills, abilities, or knowledge that enable or qualify someone to perform a particular function or to carry out selected responsibilities."[11] They are careful to note that they do not necessarily consider "behavioral characteristics or personality traits" as part of a definition of competencies, perhaps because they are more difficult to learn and measure.[12]

A typical way to present competencies is through a "competencies" or "core competencies" document. Lester and Van Fleet explain that LIS competencies documents "are those statements of desired knowledge, skills, and attitudes evidenced by practitioners and promulgated by national associations whose missions support and advance the professions related to the discipline of library and information studies."[13] Numerous core competencies documents have been produced in areas of LIS specialization. Special librarians were the first to define core competencies for their respective area in a series of documents in the early and mid-1990s.[14] ALA began work on a core competencies document for librarians in 1999 that sought to define "the basic knowledge to be possessed by all persons graduating from an ALA-accredited master's program in library and information studies."[15] The completed document was approved and adopted as policy by the ALA Council in 2009. WebJunction produced a "competency index" in 2009 (subsequently updated in 2014) that was designed to "[help] staff identify and obtain the knowledge, skills and support needed to power relevant and vibrant libraries."[16] Other areas of specialty in LIS have produced competency documents, including the Art Libraries Society of North America, the Music Library Association, and NASIG.[17] Hirsh writes that such documents can be beneficial for stakeholders, including library leaders creating position descriptions and evaluating performance, and LIS schools updating their curriculum.[18]

ALA's *Core Competences of Librarianship* contains forty-one specific competencies listed under eight broad categories. The third broad category, "Organization of Recorded Knowledge and Information," provides three specific competencies:

3A. The principles involved in the organization and representation of recorded knowledge and information.

3B. The developmental, descriptive, and evaluative skills needed to organize recorded knowledge and information resources.

3C. The systems of cataloging, metadata, indexing, and classification standards and methods used to organize recorded knowledge and information.[19]

WebJunction's 2014 *Competency Index for the Library Field* contains two "essential library competencies: technology and personal/interpersonal." It breaks down further

competencies by area of focus: library collection, library management, public services, and systems and IT.[20] Cataloging competencies are cited specifically in the "library collection competencies" category. Although there is greater detail in WebJunction's cataloging competencies than ALA's document, it is not fully serviceable as a comprehensive list of competencies for cataloging and metadata professionals. Listing cataloging-specific competencies in isolation from other competencies may give the impression that other, non-cataloging-specific competencies are less important to the work of the modern cataloger, which is not the case.

To gain a better sense of what should be included in a competencies document drafted specifically for cataloging and metadata professional librarians, the task force reviewed cataloging and metadata literature published from 2010 through 2015. In addition to knowing and applying various standards, such as Resource Description and Access (RDA) and Machine-Readable Cataloging (MARC), Joudrey and McGinnis cite the need for cataloging and metadata professionals to be aware of the broader information environment and trends, both within and external to libraries.[21] Other papers cite the importance for cataloging and metadata librarians to have "soft skills." These skills often include effective communication (writing, speaking, and listening) and collaboration, self-motivation, the ability to work independently, open-mindedness, flexibility, and a desire to continue learning new skills and acquiring knowledge throughout one's career.[22] According to Han and Hswe, these desirable soft skills cut across the cataloging and metadata job positions they studied.[23] The main difference Han and Hswe discerned between announcements for cataloging positions and those for metadata positions was an increased emphasis on "emerging technologies" knowledge in the metadata positions.[24] Mitchell adds that metadata professionals will likely need more understanding of and experience with programming languages and metadata transformation than cataloging professionals, but that the skills and knowledge needed for metadata positions are also becoming increasingly desirable in traditional cataloging positions.[25]

Boyd and Gould, in a book chapter about needed skills for technical services librarians, reference the importance of tech savviness, time management, creativity, advocacy, and professional networking in addition to the previously noted soft skills. It is critical for cataloging and metadata professionals to understand that they will need to contribute more than just metadata as library work becomes less siloed.[26] Diao and Hernández emphasize the need to understand quality issues, provide authority control, and approach metadata creation creatively (e.g., using pragmatic solutions rather than relying solely on cataloging standards to solve problems).[27]

Several presentations given between 2013 and 2015 confirm conclusions made in the literature and add additional areas of consideration. Carlyle emphasizes the need to understand marketing and advocacy, project management, and metadata and ontology design.[28] Bothmann highlights soft skills (e.g., negotiation, curiosity, critical thinking), leadership, and proficiency in multiple languages.[29] Panchyshyn focuses on the need for catalogers and metadata librarians to be fluent in current (RDA) and emerging (BIBFRAME) metadata standards, plus batch processing.[30] O'Dell stresses that the next generation "Cataloger 3.0" must know and apply traditional cataloging standards, and also be comfortable with Semantic Web standards and the programming and transformation languages mentioned by Mitchell, in part to facilitate communicating and collaborating with communities external to libraries.[31]

To further clarify needed competencies, the task force examined advertisements for professional cataloging and metadata positions posted between 2010 and 2015. This study verified much of what was discovered in the LIS literature and presentations. Experience working with various metadata standards, such as MARC, RDA, and Dublin Core, was most frequently cited, with communication, collaboration, and general soft skills (critical thinking, time management, open-minded listening, ability to work in a diverse setting, etc.) following closely behind. Most position announcements desired experience rather than knowledge of standards, systems, etc., and this also applied to soft skills. Employers seek candidates who provide concrete examples that demonstrate competencies such as being communicators and collaborators rather than simply stating that they have mastered those competencies.

Task Force Formation

The Cataloging Competencies Task Force was created to address a need clarified during the CECCIG business meeting at the 2015 ALA Midwinter Meeting. During that meeting, the interest group chair led a discussion to explore use cases for a cataloging competencies document, to learn about similar efforts to produce this type of document, and to identity potential stakeholders. The CECCIG leaders collected crucial feedback during the meeting regarding what the cataloging community sought in a competencies document. Meeting participants advised CECCIG leadership to focus on foundational principles of cataloging, rather than specific applications, operating systems, standards, etc., which are quickly superseded, and made clear that the document needed to be useful to both cataloging educators and practitioners. Meeting attendees suggested developing a competencies statement that would encompass a cataloger's total career development, rather than one that outlines the competencies required for new catalogers. Finally, participants requested that the core competencies document

be extensible, allowing specialized domains (such as serials, audio-visual materials, cartographic resources, music, law, and special collections cataloging) to adapt or build upon the document to address their respective areas' needs.

Following the meeting, the CECCIG chair consulted with the CaMMS Executive Committee, which recommended that the CECCIG charge a task force to complete this work. CECCIG leadership drafted the following charge:

> The Cataloging Competencies Task Force is charged to draft a core competencies document enumerating the skills and knowledge required for a career in cataloging for use by cataloging practitioners and educators. The Task Force will identify competencies that are broad enough to be applicable to all concerned with metadata creation, with the intent that specialized communities will extend the document in the future.

> The Task Force will ensure that the document focuses on the foundational principles of cataloging and metadata creation and avoid recommending specific tools and standards (tools and standards may be referenced in examples, if desired). Finally, the competencies document should acknowledge catalogers' total education and career-long development, rather than identifying a basic set of skills for new library and information science graduates.

> The Task Force will submit a first draft to the Competencies and Education for a Career in Cataloging Interest Group (CECCIG) by Friday, December 4, 2015. The Task Force chair will distribute the draft for community comment by December 11, in advance of the ALA Midwinter Meeting. A public comment forum will be held during the CECCIG's Midwinter meeting on Friday, January 8, 2016.

The CECCIG leadership appointed Bruce Evans as chair of the Cataloging Competencies Task Force. During the CECCIG business meeting at the 2015 ALA Annual Conference, the CECCIG incoming co-chairs, on behalf of the newly appointed task force chair, solicited volunteers to serve on the task force. They were successful in recruiting several interested members, including the current and incoming interest group vice co-chairs. With the task force membership thus identified, Evans led a series of conference calls to design the research methodology and divide the work.

Method

The task force began with the literature and position announcement review summarized above to understand the nature of competencies documents generally, and to determine the specific core competencies expected of catalogers. Position announcements examined were limited to professional positions, and included specialist areas, such as serials and media cataloging. The task force included "blended" jobs in the analysis but rejected advertisements that did not include at least half-time responsibility for cataloging. A total of 203 advertisements posted between 2010 and 2015 were examined. Of those 203, 108 advertisements were for entry-level positions, 33 were mid-level, and 62 were management positions.

A content analysis of the data collected from the LIS literature review provided a list of core competencies categories.[32] A companion document defining each category was created to ensure consistent interpretation of the categories.[33] The competencies in the list were then categorized, counted, and evaluated.

The task force found that many advertisements did not distinguish whether knowledge or experience was required, or if a criterion was required or preferred. The announcements often used an activity, such as "original cataloging" or "copy cataloging," as shorthand to refer to an entire suite of knowledge, skills, and abilities, making it impossible for the task force to determine which competencies were expected. Tasks such as classification and authority work were often omitted from advertisements, although the experience of the task force members confirmed that these tasks are central to the work of all professional catalogers.

Position announcements often included exhaustive lists of standards and technologies without indicating the desired outcome of the use of those tools, leaving the task force to speculate regarding the required competency. Many advertisements listed a preference for knowledge of advanced technologies such as RDF, SKOS, and SPARQL, while it was clear from the listed responsibilities that the advertising library had not implemented those technologies when the position was posted. The inclusion of competence with such tools suggests that advertisements are frequently aspirational in nature, detailing the work a library would like to do in the future, in addition to listing required competencies for current work.

The task force presented its work in analyzing the literature and position announcements at the 2016 ALA Midwinter Meeting.[34] To encourage discussion and solicit feedback, Evans shared two possible models for framing a competencies document, a Draft Competency Job Duty Correlation and a Draft Cataloging Competencies Blueprint. The correlation model mapped job duties taken from the evaluated position advertisements to specific competencies.[35] The blueprint model categorized competencies into ten areas, including Intellectual access and information organization, Standards for description of information resources, and Soft skills. The competencies in those ten

areas were subdivided into "Fundamental," "Intermediate," and "Advanced" categories.[36]

Discussion with the cataloging community members present at the meeting revealed gaps, potential pitfalls, and use cases for a core competencies document. Participants wanted the document to address competencies needed to conduct ancillary duties, such as selecting an integrated library system or consulting about metadata in digital collections platforms (i.e., metadata outside of the catalog). Soft skills, such as communication and time management, were suggested, as well as behavior-based competencies, such as exhibiting curiosity, the ability to negotiate ambiguous metadata standards, and the ability to make independent judgments when faced with difficult cataloging situations.

Meeting participants also had suggestions regarding how the task force might structure the document. The proposed levels of core competency—"Fundamental," "Intermediate," and "Advanced"—were considered problematic, since those categories are artificial and vary widely across different organizations. Boundaries between those levels are fluid, and their use in the document would require more frequent updates. Some participants suggested broadening the document's scope to include paraprofessional catalogers, since they undertake a wide range of work, including everything from purely clerical processing tasks to producing Program for Cooperative Cataloging Monographic Bibliographic Record Cooperative Program/Cooperative Online Serials Program (PCC BIBCO/CONSER) records.

The discussion revealed concerns that a core competencies document could be interpreted as a comprehensive checklist, potentially discouraging cataloging educators and those wishing to embark on metadata and cataloging work. A participant asked the task force to consider that the document might be used punitively against a cataloger by administrators or tenure committees. For example, a cataloger could be unfairly penalized for not pursuing continuing education when his/her institution does not provide financial support or time off for such activities, and a failure to meet certain competencies might be used as an argument against the granting of promotion or tenure.

Despite concerns, several use cases for a core competencies document emerged from the discussion. Participants anticipating hiring were eager to have a competencies document to aid in writing position descriptions and preparing interview questions, while others hoped to use the document as an advocacy tool. Several attendees specifically commented on the need to address diversity concerns and the conflicts between the existence of tools and equitable availability of access to those tools. A few participants expressed interest in a forward-looking core competencies document that would help shift the focus of the profession toward creating metadata for unique, local collections, especially on platforms that use a wider array of metadata standards than is currently found in most institutions. Finally, participants requested that this document be brought before the ALCTS Executive Board to be adopted, reviewed regularly, and incorporated into ALCTS training and professional development activities.

Phase 2

The task force entered a new phase of work on the project following the discussion at the 2016 ALA Midwinter Meeting. This phase was known to task force members as "Phase Two." Due to the feedback received, the task force needed to make a number of decisions about directions for the group's work. Shortly after the Midwinter Meeting, Evans held a conference call with CECCIG co-chairs Jennifer Liss and Karen Snow to discuss next steps. They concluded that since the upcoming work required processing and synthesizing of the research and discussion into a finely tuned and polished competencies document, it would be useful to revise the task force membership into a smaller and more focused group. The smaller group eventually included only current and former CECCIG chairs, co-chairs, and incoming co-chairs.

For the first virtual meeting of the revised task force membership, the group decided that a free, web-based meeting tool that allowed participants to use video was preferable to a more traditional audio-only conference call. Since most of the task force members had previously used Google Hangouts, that platform was selected. The group found meeting via Google Hangouts was successful and continued to use the platform for all subsequent virtual meetings. There were occasional technical difficulties, but those experiences helped to establish rapport and community within the group and helped hone the group's ability to solve problems as a team. Task force members appreciated the ability to see each other's facial expressions during the calls both to improve communication regarding the work at hand and to facilitate the overcoming of technical issues collaboratively.

At the first Hangout in February 2016, the task force concluded that most of the feedback and comments fell into two broad areas: (1) form and organization and (2) content. The group observed that while there were a number of concerns regarding how intermediate and advanced competencies were handled, the need for fundamental or foundational competencies was not a point of controversy.

A final major reflection on the Midwinter Meeting feedback concerned how to address diversity and ethical concerns. The task force sought advice from ALCTS CaMMS leadership, asking how ALCTS felt that a core competencies document should address cataloging ethics, including, but not limited to, cultural sensitivity regarding Library of Congress Subject Headings (LCSH) assignment or name authority record creation. The ALCTS leadership

emailed a thoughtful response stating that while they definitely agreed that identifying diversity and ethical concerns carried great importance, the topic was too extensive to address completely in a competency document. After consideration, the task force decided to primarily limit the discussion of ethics to the document's preamble.

As the task force began work on the document's content, it was decided that the competencies should be kept as general as possible. Since there would be no way to include every possible competency needed by all catalogers or metadata professionals, it was agreed that the competencies should represent a baseline.

In April 2016, they narrowed the document's scope to professional competencies, with a recommendation that a separate paraprofessional competencies document be completed in the future. This decision was made after considering: (1) Midwinter feedback on how the draft competencies chart was not scalable enough to cover both paraprofessional and professional positions, (2) the wide range of paraprofessional positions and responsibilities (ranging from checking descriptive information to doing BIBCO/CONSER work), and (3) the lack of paraprofessional representation on the current task force. The ALCTS CaMMS Copy Cataloging Interest Group and the ALA Library Support Staff Interests Round Table (LSSIRT) were identified as potential partners for this future effort.

In discussing the document's form and organization, the task force considered the models and approaches suggested by audience members at Midwinter, one of which was to adopt an "à la carte" approach. The task force determined that this approach was not appropriate for the core competencies due to their nature and would not accurately represent the progression of some of the intermediate and advanced competencies. In February 2016, task force members tried to organize the intermediate and advanced competencies within different career tracks, such as managerial or subject/material specialist, since administrative or managerial roles in a department require substantially different skills than those focused on complex cataloging and metadata creation.

In spring 2016, the task force hypothesized that a visual representation would make the competencies easier to understand and would better represent the different career paths of cataloging and metadata professionals. They decided on a tree visualization, with one tree representing Practitioner Knowledge and another representing Leadership Knowledge. The two trees were connected by the soil, which represented the foundational competencies, and intermediate and advanced competencies were represented by the tree branches. The plan was that the visualization would be accompanied by a document with terms and definitions. Each task force member created a tree visualization, with the intent that the various visualizations

would be consolidated into a single agreed-upon version. Although the visualization strategy was a helpful tool for clarifying ideas and categorizing competencies, it was ultimately abandoned in favor of a traditional textual approach to organization. None of the team members believed that the visualizations communicated the competencies information clearly enough. The team agreed that a text-based competencies document would be more readily received by the wide audience who would be asked to analyze, critique, approve, and utilize it.

In late May 2016, Snow brought to the task force's attention a set of competency types, or categories, she had discovered on the Washington State Office of Management's website: "knowledge competencies (practical or theoretical understanding of subjects), skill and ability competencies (natural or learned capacities to perform acts), and behavioral competencies (patterns of action or conduct)."[37] The task force reframed the cataloging competencies into those three categories and transformed the intermediate and advanced competencies into a single category titled "Going Beyond the Foundation."

During a June 1, 2016, virtual meeting, the task force decided on a structure for the first draft of the document to be called the "DRAFT Cataloging Core Competencies for Professional Catalogers." The introduction would cover the scope and intended audience, plus address diversity concerns. The primary document's main body would provide explanations of the competency categories and list the core, or foundational, competencies with illustrative examples. An "epilogue" would cover the "Going Beyond the Foundation" competencies. Both the core and the "Going Beyond the Foundation" competencies were organized into the knowledge, skill and ability, and behavioral categories.

Task force members volunteered to write specific parts of the document and began work immediately. The entire document was stored in a Google Docs file, allowing task force members to simultaneously work on the same version of a document and hold simple discussions via comments. The Google Docs platform was effective for collaborative writing, although its formatting capabilities are lacking in comparison to more traditional word-processing software.

The task force created a first rough draft within a few days following the June meeting. Once the basic structure of the document was in place, members continued to contribute additional competencies and examples based on the group's earlier research and their own experiences. All task force members contributed in the iterative process of editing the complete document. Discussion regarding changes that were too complicated to be resolved via comments on the document were held through email. The task force chair also used email for regular progress reports.

Evans presented the completed first draft at the CEC-CIG meeting during the 2016 ALA Annual Conference. At

the conclusion of his presentation, he invited the audience to break into smaller groups to discuss the following questions:

1. Is this overall document relevant to practitioners/educators?
2. What skills/knowledge are we missing?
3. Where are we too granular/not granular enough?
4. Are we acknowledging the breadth of the whole career and life-long learning opportunities?

In addition to presenting the draft competencies document at the CECCIG session at ALA Annual 2016, the task force submitted it for online public comment via Google Docs during July 2016.

Phase 3

The task force spent the months following the 2016 ALA Annual Conference and the month-long open comment period in July 2016 analyzing the massive amounts of feedback received through both venues and incorporating it into a revised draft. Discussions regarding what to change and how were conducted via Google Hangouts calls and email. By this point, the group had worked together long enough to have a good sense of how to work together efficiently, and most matters were quickly resolved, with consensus within the group being reached very quickly in most cases.

While there were various types of feedback, the majority of comments fell into broad overall themes. Many people expressed concerns with the "Going Beyond the Foundation" section, with some suggesting the creation of a separate document or recommending scrapping it entirely. Those who commented noted the following: (1) many of the competencies within the section were not specific to catalogers, (2) the optional and more advanced competencies could potentially be misconstrued as core competencies by managers and human resource personnel since they were in a core competencies document, and (3) it might be preferable to refer to other resources, such as one in development by the Library Leadership and Management Association (LLAMA), for leadership and managerial related competencies. After considering the issues, the task force decided to incorporate content from the "Going Beyond the Foundation" section that members felt needed to remain in the "Core Competencies" section and remove the rest.

The behavioral competencies raised similar concerns, such as how many of these "soft skills" are expected of *all* librarians, not just catalog and metadata librarians. Those who provided comments questioned how these competencies could be taught or learned. The task force felt strongly that the behavioral competencies should be included as they were necessary for a successful career in cataloging

and metadata and are often included in position advertisements. The behavioral competencies were retained and rewritten to use active tense.

Feedback concerning the diversity statement in the preamble was divided. In the draft competencies document, a preamble was inserted to emphasize the importance of diversity in cataloging and metadata work. Some of those who provided feedback felt the preamble was sufficient for addressing this importance, while others felt that it should be included as one of the core competencies and not included in the document's introduction. Following an e-mail discussion of this feedback, the task force decided to keep the diversity preamble and added several competencies related to diversity in the "Behavioral Competencies" section.

Some people who had provided feedback expressed unease with the inclusion of examples in the document (for example, "Understands the nature and function of cooperative bibliographic databases, Examples: OCLC WorldCat, III SkyRiver").[38] The concern was that the presence of specific examples might be perceived as recommendations for, or endorsements of, certain standards, companies, or systems. Others felt that the examples were useful for helping to explain unfamiliar or abstract terms and concepts, which would be especially helpful to students and others new to cataloging and metadata. This opinion was shared by the task force and a decision was made to keep the examples. The task force made changes to ensure that the examples used were more diverse than those in the first draft, and that free and open source options were well represented. Additionally, the task force added a disclaimer that the examples "are for illustrative purposes only and should not be considered prescriptive, exhaustive, or as an endorsement of a particular product or service," and added an appendix containing the acronyms and initialisms used in the document.[39]

Once the final edits were complete, the document was presented to the CaMMS Executive Board. Upon approval by the CaMMS board, the document was forwarded to the ALCTS Board of Directors for their final approval. That approval was granted following the 2017 ALA Midwinter Meeting.

Lessons Learned

The task force makes the following recommendations for groups wishing to create a competencies document:

1. *Use the opportunity to have an ongoing dialogue with a diverse group of stakeholders. Recognize, value, and widely solicit their expertise and input throughout the*

entire course of document planning and writing. The task force used suggestions and affirmations to guide its work throughout the process, and the team gained critical knowledge and insight by broadening the conversation about competencies to the larger community that was interested in cataloging and metadata education, practice, and management. Attention to issues of diversity is one example in which community input was used to improve the document.

2. *Limit your primary writing team to a manageable number of people (six or seven) who represent the stakeholders and can provide multiple viewpoints (e.g., practitioners and educators). Select a project manager who can set deadlines, motivate team members, resolve disagreements, and achieve results*. Understand that team membership may change over time. For example, membership contracted in the task force when the nature of the work became more detailed, and member commitments shifted to other projects. Membership expanded when new CECCIG officers came on board with additional areas of expertise.

3. *Meet regularly using reliable technology to enable document sharing and feedback*. All team members should be reasonably comfortable and satisfied with the selected technology. The task force carefully selected and successfully used Google Docs and Hangouts for collaboration, but teams should get member input and consider past experience when selecting work-sharing tools.

4. *Be flexible, understanding that your goals and the end product may change during the course of the project*. The task force began the project with the knowledge that the undertaking was complex, the stakeholders were numerous, and that the work would be influenced by community needs and input. The likelihood was high that the project's scope could contract or expand based on new information. Understanding these potentialities kept the team from being resistant to criticism or the need for document modifications.

5. *Use professional association meetings and events to advance the project, share progress reports, and solicit feedback*. The task force used a portion of the meeting time allotted to it at the ALA Midwinter and Annual Conferences to obtain community input and to make official reports about the project progress, and conference programs focused on topics aligned with the project mission to stimulate conversation and discuss issues related to the competencies. Team members also met face-to-face at the conferences to plan and work on the project, and used listservs and discussion lists to inform stakeholders about the project's

progress and to encourage them to provide feedback through a variety of venues. The task force found using professional conference meeting times as hard deadlines for project deliverables to be very effective.

6. *Formalize a plan for a regular review and revision, since a completed and approved competencies document immediately runs the risk of becoming irrelevant and inaccurate*. The CECCIG plans to incorporate as part of its mission the regular review and revision of the competencies document, with all formal changes to be approved by the ALCTS Board of Directors.

7. *Celebrate milestones by meeting in person to socialize whenever possible! A meal or toast shared can make the hard work seem like fun.*

Conclusion

The Cataloging Competencies Task Force was given the pragmatic charge to create a competencies document to meet multiple criteria; it would need to be formulated with the practitioner and educator in mind, be based on foundational principles, be relevant to individuals at a variety of career stages and be extensible to the full range of specific domains across cataloging and metadata jobs. As task force members contemplated the role of competencies in library and information science careers and beyond by reviewing relevant literature, analyzing job advertisements, and discussing possible competencies, the importance of hearing the ideas and concerns of the many potential users of such a document became clear. Position announcements and the voices of a vocal few could skew the relative importance of particular competencies. Soliciting the input of interested practitioners, educators, students, and others throughout the process is certainly a primary key to the successful creation of the document.

Although a core competencies document is a natural, and somewhat anticipated, output of an interest group dedicated to competencies and education, the process of its creation has been worthy of examination and reflection by the participants in its own right. At a minimum, the core competencies document could serve as a starting point for students, practitioners, educators, and managers to plan for an individual's growth and development across the span of a working life, from novice to mid-career professional and beyond. By the time that the document was approved by the ALCTS Board of Directors in January 2017, the CECCIG Task Force members had also realized its importance as a catalyst, common ground, and safe space for dialogue among diverse constituencies who are interested in the future of education and professional development for cataloging and metadata professionals.

References and Notes

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Appendix: Timeline of Events

Creation of CECCIG's Competencies for Professional Catalog and Metadata Professionals

- ALA Midwinter Meeting, 2015: The need for a task force to create a competencies document was identified. A charge was commissioned for ALA Annual.
- ALA Annual Conference, 2015: Bruce Evans was appointed task force Chair, and a call for volunteers went out.
- Fall, 2015: The task force reviewed professional literature and job advertisements.
- ALA Midwinter Meeting, 2016: The task force chair presented the work to date and solicited feedback on two possible document models.
- Winter, 2016: Task force membership was revised to a smaller group that processed the feedback from Midwinter.
- April, 2016: The task force narrows the scope of the document to professional (MLS degreed) competencies only.

- Spring, 2016: The task force experimented with visualizations of the competencies as an alternative to a text-based document. This avenue is later abandoned.
- June 1, 2016: The task force discussed the first draft of the competencies document at a virtual meeting.
- ALA Annual Conference, 2016: The task force chair presented a draft of the competencies document and solicited feedback on the draft.
- July, 2016: The draft document was opened for public comment as a Google document.
- Fall, 2016: The task force processed feedback from ALA Annual and the open comment period and finalized the competencies document.
- ALA Midwinter Meeting, 2017: The task force submitted the final document to CaMMS and subsequently ALCTS executive boards for approval. The final document was approved at this meeting.