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Metadata specialists in transition: from MARC cataloging to linked data and BIBFRAME (data deluge column)
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Metadata specialists in transition: from MARC cataloging to linked data and BIBFRAME (data deluge column)

Donna E. Frederick

The [Association of Library Collections and Technical Services \(2016\)](#), better known as ALCTS, is a division of the American Library Association. Approximately once a month, ALCTS hosts an “eForum” which is a moderated email-based discussion. The February 2016 ALCTS eForum was called “Career Progression in Cataloging and Metadata”. It was led by Lisa Robinson of Michigan State University and Stacie Traill of the University of Minnesota. [Robinson and Traill \(2016\)](#) have provided a summary of the discussion on a publicly accessible website, which is referenced at the end of the column. There were a number of comments and discussion threads which reflect the changing nature of library data or metadata; how it is created and managed; and the specific skill sets of catalogers and metadata librarians. This installment of the Data Deluge contains an examination and discussion of challenges associated with the role and career progression of catalogers and metadata specialists as

they establish their place in the emerging linked data movement in libraries.

A discussion of this eForum as the topic for this installment of the Data Deluge column was suggested to the author. She was quick to take up the opportunity to report and reflect upon the discussions seeing as she is a cataloger and metadata specialist and shares many of the concerns of the participants. While some readers of this column may be catalogers and metadata librarians (metadata specialists), it is reasonable to expect that most are not. It is difficult to separate the analysis of the discussion from the author’s experience and opinions on the matter. However, she hopes that readers will remain open to the sentiments expressed by eForum participants and consider how the various tensions and contradictions discussed might impact on the success and effectiveness of implementing linked data technologies in libraries.

The eForum was initiated by asking participants to discuss questions such as

“How do you switch specialties within cataloging? How important are specialties within traditional cataloging? Is ‘metadata’ a different specialty?” etc. Embedded within the answers to these questions were reflections on “how did we get where we are today?” Many commenters felt that there is a disjointed and inaccurate understanding of the work of catalogers which is held by many librarians and administrators. This is a view which often places the work of catalogers as something “of the past” and outside of the bigger picture of metadata, including linked data on the web. eForum participants expressed frustration with the view of catalogers as antiquated and siloed specialists. This being said, some participants felt that the continued close ties between the work of catalogers and the MARC standard has naturally given non-catalogers the opinions they often hold. For example, Jennifer Sweda of the University of Pennsylvania stated, “At its heart, cataloging is about describing (using standards and controlled vocabularies) materials and making them accessible. That’s metadata. But we’ve been stuck in MARC-land for so long. [...] and the internet, with its own standards and vocabularies, grew up around us. [...]. We have a lot to offer them and it’s a mistake to ignore us for something that sounds fancier”. Julie Moore of Fresno State University pointed out a belief which appears to be commonly held by cataloging librarians but not within librarianship as a whole in her statement, “I think that it is vitally important for catalogers and metadata specialists to have a deep understanding of MARC coding and the AACR rules that we have used in the past to gracefully move into the future”. The author of this article has often felt that many librarians hold the opinion that it is precisely cataloger’s knowledge of MARC and AACR2 which discounts cataloging librarians as being the “experts” who can help libraries make the transition from siloed discovery environments to the expansive world of linked open data on the semantic web. It is almost as if traditional cataloging is a taint or a disability which prevents those who are

knowledgeable and skilled in traditional cataloging from being not only active and useful participants in the transition, but also from taking the leadership role which metadata specialists often feel they are well-equipped to assume. This is just one of the many contradictions between how some metadata specialists view themselves, including the value of their knowledge in the emerging information environments, and what they experience as the attitudes of administrators and other library employees.

Later in the discussion, Lynne Jacobsen of Pepperdine University summarized a vision of the metadata speciality, elements of which could be found in other posts throughout the eForum:

Cataloging/metadata/linked data are all somewhat different, yet related. I feel this is definitely a specialization in librarianship, and people in these positions should not be expected to work reference desks or teach bibliographic instruction. Cataloging is a fast changing area and is becoming increasingly complex as we move away from MARC and AACR2 to RDA, RDF, and Linked Data of the Semantic Web. This is all happening on a world stage with VIAF and establishing uniform resource identifiers (URIs). Catalogers must know every format and all of the rules that apply. They have to maintain legacy data, but also move forward with new types of data.

While the author of this column does not feel that there is a problem with catalogers or metadata specialists doing reference work or teaching classes *per se*, she agrees that there is too much to learn and too much to accomplish in these changing times to be involved with activities which take time, energy and focus away from the work which catalogers or metadata specialists are well-suited to undertake in the emerging information environment. This is an environment which is increasingly focused on linked data technologies. While there once may have been a sense that linked data is primarily the realm of systems librarians and information technology professionals, the eForum revealed that this view is shifting. As libraries experiment with and implement linked data-based

discovery environments, it is becoming increasingly apparent that the lion’s share of heavy lifting work will be done by specialists who are most likely to evolve out of the skill set of today’s catalogers. These are specialists who have a theoretical understanding of the new models and practical skills in creating controlled vocabularies and identifiers. Many outside of the cataloging and metadata specialization are not yet able to recognize what now seems to be the “natural” role of the cataloger in development and implementation of linked data in libraries. eForum participants seemed quite clear in their belief that they are the natural leaders in the emerging information environment and they are frustrated due to a lack of recognition and support in their emerging role.

There were discussion threads which reflected a tension which has developed in many libraries wherein those librarians who see themselves as having the knowledge, skills and experience necessary for working in emerging linked data and other web-based discovery environments are essentially overlooked, underestimated and underfunded. Evidence of this tension can be found in situations where catalogers find themselves stretched very thin in their existing roles. Sweda, for example, suggests the following:

In my opinion, another big piece of the puzzle is that for quite some time now, cataloging depts have suffered from a serious lack of support. People may not understand what we do (our colleagues included) and so they undervalue it. Patrons don’t see us at all in larger institutions [...].

And now, skimping on cataloging depts has caused some problems when everyone is talking about metadata. And I mean everyone, outside of libraries especially. I see people on TV using the word, people giving lectures outside of academia using the word, people on NPR using the word – none of them are library or info science people. So we’re scrambling to find people and get the work done, and it seems like, in a lot of places that can afford it, that work is going to a whole new crop of people with “access” or “digital humanities” or

“metadata specialist” in their titles. And that’s great. But often, those people aren’t located in tech svcs or cataloging depts. which leaves [us] behind again.

Sweda’s comments reveal a common sentiment that was found throughout the eForum with regard to a belief that library administrators, and, to a certain extent, the rest of librarianship tend to not understand their work and, as a result, devalue it. Even when catalogers attempt to explain their role and offer their expertise, eForum participants reported that other librarians may reject or dismiss them. Julie Moore elaborates on the resulting frustration:

There are many people who are doing metadata sort of jobs and working on digital collections who do not have this understanding or appreciation. I, too, have run into these metadata projects where everyone at the table has an equal voice [...] and they don’t know what they don’t know. I see it as my role to educate, but it becomes a futile effort when others do not want to learn what you are trying to show them. The thing is that in metadata projects, you often run into similar problems that you have in a traditional catalog [...] things like authority control. How many times have I heard, “Oh, everyone just does keyword searching anyway [...] we don’t need authority control.” And then a few years later, they’re complaining about how their subjects are all over the board.

Christine Schwartz of Princeton provided another example of a situation where a library has bypassed metadata specialist knowledge and expertise where it is freely offered:

This past year we were ramping up digitizing serials and I wanted to revisit some of the elements we originally chose for serials, since they were chosen rather quickly as we only had a few serials to deal with in the early stages of the project. A non-librarian said to me, ‘We’re doing informal metadata just for display in the system, not formal metadata—MODS, METS, etc.’ and so we did not review the data elements for serials.

As someone who spent six years doing serials cataloging, I was disappointed and discouraged in my role as metadata librarian. I should add that this is not an everyday thing, but it did make me question my ability to communicate and transfer

over valuable aspects of cataloging and library metadata standards.

The writer of this column discovered in a yet-to-be-published literature review of articles about catalogers’ self-perception of their place within librarianship that the sentiment of being undervalued and dismissed has been both common and relatively constant over the past three decades. Many catalogers feel that they are over-worked and underpaid relative to other librarians and that they often have to overcome systemic barriers to professional advancement. Hill (2007), for example, reported that some catalogers in academic libraries have found tenure-track cataloging positions to be difficult to obtain and achieving tenure more challenging relative to other academic librarians. Given the outcome of the author’s literature review, it is not surprising to find elements of the same sentiments in the eForum discussions. Becker, for example, described a situation where the status of metadata specialists was systematically lowered:

During a reorganization at my college library, all technical services staff were positioned lower than other librarians. Collection development staff and reference librarians were slotted as level 4, whereas cataloging, acquisitions, and serials staff were on level 2 or 3. This has always bothered me, and every supervisor I’ve had has refused to question this hierarchy. Technical services staff members are highly respected by their colleagues, but not by administrators.

In addition to misunderstanding and devaluing the work, there was an indication of a growing inequality among large and small libraries and library sectors with regard to under-support of cataloging and metadata roles and the inability to progress professionally. Sarah Becker describes how the “skipping” issue is particularly concerning for her library:

In a four-year liberal arts college, we have a small technical services staff. When filling a cataloging and metadata manager position, someone from outside was hired, partly because the in-house

catalogers did not have the MLS. So there is no possibility of moving up within the department. The same situation applies to acquisitions, serials, and interlibrary-loan staff; staff members would have to move out to move up.

This is disheartening for staff who love their jobs and their college, but who need to advance professionally.

The sentiment that the speciality not only suffers from being undervalued but that there is not always a clear career progression could also be seen in discussions about succession-planning for cataloger retirements. For example, Moore described ongoing issues at her library where retirements do not create opportunities for newer catalogers:

Over the past 11 years that I have been here, we have had 6 catalog librarians retire and probably twice as many cataloging staff members retire. The librarians have all given at least 1 year’s notice that they were going to retire. But once they leave, our administration acts surprised [...] and asks, “What do we do, now that so-and-so has retired?!” They are eager to move the funds for the position elsewhere. The burden then really falls on the people remaining in cataloging, as they have to somehow deal with the stuff coming in [...] but it is in a chaotic, unplanned manner.

When retirements are addressed in this manner, it is not surprising that cataloging librarians begin to feel overworked. When funds for positions are moved “elsewhere”, opportunities for newer cataloging librarians to “move up” are lost. This example reinforces the impression that catalogers and metadata specialists hold of themselves as overworked and underappreciated.

Given that cataloging and metadata specialists recognize that they have skills and knowledge which are beneficial to the development of the new linked data description and discovery environments in libraries and also recognize a certain persistent “image problem”, eForum participants also recognized a need to improve their position within librarianship so that they can position themselves to assume new roles. Issues around how traditional metadata specialists can

make themselves “appear” more relevant in the new and emerging environments were also discussed. Sweda suggested:

So now, traditional catalogers are up against several challenges: improving our skills, competing to be more visible, marketing ourselves (as we’ve always had to do) in new ways, proving our worth, while new positions have been created for people who do things similar to what we’ve been doing, though often with much more recent skills and experience. Many of those positions have been created with outward-facing goals. Lots of liaison work. That is especially new for traditional catalogers; our positions didn’t usually include codified liaison work, but if we want to be in the game, we need those sorts of opportunities. How do we make those opportunities or respond to our administration’s request that we meet them?

However, later in the discussion, Sweda elaborates on how and why meeting these challenges can be an uphill battle for many metadata specialists despite the fact that they already have considerable knowledge, skills and experience:

There is a steep learning curve with some of this new technology. Right now, I spend a lot of my time at my desk, quietly reading. “How do I create an RDF triple, again?” “How is a query structured?” “Wait, the PCC just put out a manual for xyz.” “What’s the latest from LC on BibFrame?” None of this translates to statistics, which is a way catalogers have been showing our productivity for a very long time. So if our bosses want us to make these changes, they are going to have to commit to teaching us and/or giving us the time to learn about something very new to some of us (not all, of course). If they can’t make that commitment, I think they owe it to us to let us know where we stand.

Certainly, pressures to be productive create another tension in a changing environment. When there is no change, catalogers can become very proficient and efficient by applying the same standards and rules repeatedly. However, in times of change, time must be taken to learn the new models and standards, and to practice the new skills. Given that RDA instructions, for

example, change each fall and spring, and that the development of RDA and other new cataloging standards is iterative, there is no point at which learning RDA is “complete”. Many catalogers find that to do their job in 2016, they must know more and learn more than they did as little as three years ago. As Sweda suggests and the author has also found in her own library, there is no corresponding adjustment made by library administrators to give catalogers the time and resources to do this learning. Moore discussed how the challenge partially arises out of what was previously described as “skimping”:

Because we went for so many years of our cataloging staff retiring or transferring (and not being replaced), and with the re-structure of our library (so that the cataloging functions were subsumed by IT), we do not have enough people to make the distinction. I think that we are moving toward a place where everyone who does cataloging will also create non-MARC metadata, for better or for worse.

It does require quite a bit of studying and professional development to be able to make the move from traditional cataloging to non-MARC metadata creation (if you don’t have someone there to show you how) for a smoother transition.

The reality is that with the fast rate of change, there often is not “someone there to show you how” because, with the new standards and guidelines, the entire cataloging and metadata community is essentially learning them and applying them simultaneously. The author has noted that discussions on many listservs are characterized by both the most senior and seasoned of professionals wrestling with instruction interpretations which are posed by novice catalogers. The playing field has been leveled and the gap between the sage and the student is narrower than perhaps ever before. In addition to challenges arising from a lack of time and resources, Moore also pointed out an additional realm of difficulty which arises from the contradiction between what many graduates expect to experience and

the reality of the work environment. Her description also reinforces that view that there has been a narrowing of the gap between the most experienced and novice catalogers:

In many cases, the cataloging team at a given institution tends to be small, but busy. This doesn’t leave a lot of time for on-the-job mentoring or experimentation. Additionally, I’ve discovered that young librarians often leave school ingrained with a big view of the “Future of Cataloging,” including the use of Bibframe and linked data, that simply does not match the actual practices of libraries in the real world (yet!). (This is probably especially true in public libraries.) Sometimes it can feel like a strange game of reverse catch-up. Finally, new library science grads sometimes discover that more experienced librarians defer to them, simply because the grads are so much more familiar with technology tools, languages and concepts. It’s great to be considered an expert, but this also disrupts some of the more traditional aspects of mentor/mentee relationships.

In response to Allison, Jennifer Sweda states:

But I think the reverse is happening, too. There are metadata librarians who are being hired to manage more traditional cataloging depts. that don’t actually have a background or experience with traditional cataloging. That doesn’t mean they can’t do the job, or that having someone to lead a dept. in a new direction is a bad thing at all. But on a day to day level, it would be weird for me to not have someone with more cataloging experience to ask questions of, and to possibly have to explain cataloging to someone who is my boss. We seem to be in that transitional phase where we’re all over the map, and as you pointed out, that does disrupt the established mentor/mentee paradigm.

In sum, it appears that the tone of the eForum was a somewhat negative one where participants largely expressed their dissatisfaction with their place in the profession, their workloads, their prospects for advancement and a general sense of not being understood or respected. It would be hard to argue otherwise. The author of this column agrees with the participants who feel that catalogers and metadata specialists are well-positioned to be leaders in the

linked data movement in libraries. Catalogers were creating controlled vocabularies in the form of subject headings and identities in the form of authority data from a time before the use of an integrated library system was the status quo for a library of any size. Some questions arise from the discussions. Will catalogers and library metadata specialists be able to raise the level of understanding of their work within librarianship to the point where their colleagues will recognize and accept the value they can add to the emerging information environments? Will library administrators give existing catalogers and metadata specialists the support and resources they need to learn the new models, standards and technologies? Will these specialists be able to meet the challenges presented by the learning curve so that they can effectively merge their existing skills and knowledge with the new?

Given that the Library of Congress cataloging staff are now reported to be creating both MARC and BIBFRAME metadata in parallel and projects such as Bibflow and Linked Data for Production are underway in academic

libraries, it seems that the gradual introduction of linked data technologies beyond experimenter and early adopter libraries is likely to occur in the near future. As the average academic or large public library finds itself entering into a new context which will be built around linked data technologies, who will be the leaders? Who will be doing the heavy lifting and who will be innovating? Based on the eForum discussion, it appears that catalogers and metadata specialists believe that they can take on these roles, at least in part, but many are not confident that the whole of librarianship will accept them in this role. The author has encountered librarians who do not accept the assumption that the traditional record structure of MARC and the relational database architecture built around it will or could be replaced by a new linked data environment. Because there are no functional, future-telling crystal balls in existence, it is not possible to completely discount their disbelief despite mounting evidence that the movement toward linked data in libraries is more than a flash in the pan. Neither can we predict the future role of catalogers and metadata specialists in

libraries. However, it is the hope of the author that readers of this column, be they catalogers and metadata specialists or not, will reflect on the comments made in the eForum and how libraries can make use of existing skills, knowledge and expertise to move forward into the future – be that a linked data environment or not.

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