Cataloging for the 21st Century:
A Proposal for Continuing Education for Cataloging Professionals

A Response to Action Item 5.3 of the

"Bibliographic Control of Web Resources: A Library of Congress Action Plan"

Final Report (August 8, 2003)

Word version of final report

Appendices to the report

Work of the ALCTS Continuing Education Task Force (Action Item 5.3)

- Continuing Education for Catalogers : Survey for Practitioners (Web survey form)
  - Summary of Survey Results (March 31, 2002)
- Environmental Surveys of Continuing Education Offerings, conducted between July 2002 and February 2003 (Excel Spreadsheets)
  - Survey of Continuing Education Offerings, ALA-MLS Programs
  - Survey of Continuing Education Offerings, ARL-LAMA
  - Survey of Continuing Education Offerings, Council of Regional Groups
  - Survey of Continuing Education Offerings, OCLC Networks
  - Survey of Continuing Education Offerings, OCLC Western
  - Survey of Continuing Education Offerings, State Library Organizations: Eastern U.S.
  - Survey of Continuing Education Offerings, State Library Organizations: Western U.S.

Background Information

- [Cataloging and Metadata Education : A Proposal for Preparing Cataloging Professionals of the 21st Century](#) / by Ingrid Hsieh-Yee
- [Bibliographic Control of Web Resources: A Library of Congress Action Plan](#) Revised May 2003
- [Continuing Education Needs of Professional Catalogers: Recommendations from Topical Discussion Group 2 of the Bicentennial Conference](#)
- [Library Participation in the Development of Metadata Standards: Recommendations from Topical Discussion Group 8 of the Bicentennial Conference](#)
- [Serials Cataloging Cooperative Training Program (SCCTP)](#)
- [OCLC Library Training & Education Market Needs Assessment Study](#) (Sept. 2002)

Prepared by

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Abbreviated Charge

Continuing Education Task Force (Action Item 5.3)

The Continuing Education Task Force is charged to prepare a model curriculum for continuing education in cataloging of e-resources and metadata. It should address a variety of metadata types; interoperability issues; and general principles, practices and workflows for metadata projects. The proposal should recommend specific changes and additions to existing continuing education programs, lay out a plan for course content and sequence, and describe an appropriate delivery system for this curriculum. It should cover the period

through 2005 and contain the following sections:

- ❍ Executive Summary
- ❍ Proposal for E-Resource Cataloging and Metadata Curriculum
    - Introduction (e.g., background, needs assessment, related work)
    - Rationale and significance of the program
    - Target audience of the program
    - Objectives of the program
    - Program components (e.g., curricula, institutes, workshops, Web-based training)
    - Timeline for implementation
    - Contributions by individuals and organizations (funding and other resources)
    - Budget
    - Budget narrative
    - Plan for program evaluation

The Continuing Education Task Force is charged to follow the review and revision cycle outlined in the detailed charge, culminating with approval of the proposal by the ALCTS Board and LC Cataloging Directorate. Following approval of the proposal by ALCTS and LC, the task force will be discharged. It is anticipated that the ALCTS Executive Committee will then appoint an implementation group containing representation and/or funding from ALCTS, LC, and other identified partners.

Last updated: November 16, 2003
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What's new:

[Final report](#) of the Automatic Metadata Generation Applications (AMeGA) Project (see Goal 4.2) by Jane Greenberg, Abe Crystal, & Kristina Spurgin

[Marcia Bates presentation](#) at LC, December 12, 2003, "Supporting the Digital Library User Through Information Design Devices"

[Research and Design Review: Improving User Access to Library Catalog and Portal Information](#) by Marcia Bates (see Goal 2.3)

[Library of Congress Portals Applications Issues Group (LCPAIG)](#)

Bibliographic Control of Web Resources: A Library of Congress Action Plan

The Action Plan is now available in [PDF format](#)

If you need to update your Adobe Reader, you can get version 5.1 [by clicking on this link](#).

Introduction

The Library of Congress Cataloging Directorate is pleased to issue "Bibliographic Control of Web Resources: A Library of Congress Action Plan." The Action Plan stems from the Library of Congress Bicentennial Conference on Bibliographic Control for the New Millennium: Confronting the Challenge of Networked Resources and the Web, held on November 15-17, 2000. The Cataloging Directorate convened this invitational Conference as a working meeting of experts from the various communities that play a role in the creation, retrieval, and cataloging of Web resources. The primary goals of the Conference were: 1) to develop an overall strategy to address the challenges of improved access to Web resources through library catalogs and applications of metadata; and 2) to identify attainable actions for achieving the overall strategy. The aim of the conference, therefore, was to generate recommendations for the Library of Congress, in collaboration with the larger library community, to use as a blueprint for action to improve bibliographic control of the Web.

The Cataloging Directorate is grateful to the 135 Conference participants for their insights and expertise. Their deliberations resulted in eleven sets of recommendations that have been distilled into this Action Plan. In developing

(see Goal 2.1)

[Ingrid Hsieh-Yee's report](#) for the ALCTS Task Force for Preparing Metadata and Cataloging Educators and Trainers
(see Goal 5.1)

[Cataloging Directorate Home Page](#)

[Library of Congress Home Page](#)

the Plan, we took into account both the original Conference goals and *LC21: A Digital Strategy for the Library of Congress*, the National Academy of Sciences report commissioned by the Library.

From the content of the recommendations, we teased out some over-arching objectives for the framework of the Plan. This resulted in the identification of the following six objectives into which the action items were placed: **1** increased availability of standard records for Web resources; **2** enhanced record display and access across multiple systems; **3** collaboration among metadata standards communities for better bibliographic control of Web resources; **4** development of automated tools for harvesting and maintaining metadata; **5** provision of appropriate training for the Web environment; and **6** support of research and development to enhance bibliographic control of Web resources.

We are keen on enlisting the support and involvement of varied organizations and groups in taking concrete actions to implement our plan. For each action item, we identified LC organizations, as well as potential external collaborators, to help with implementation. Some organizations will assume lead roles; others will serve in contributing roles. Additionally, we may secure experts to serve as principal investigators. We also assigned a priority. The priorities have two aspects that were assigned as follows: near-term could be accomplished within eighteen months; long-term could be accomplished within five years. The aspect of "High," "Medium," or "Low" was assigned on the basis of the benefit each action would bring to the library community relative to the expense involved in carrying it out.

Many recommendations underscored a theme of the Conference, namely, the importance of collaboration, partnerships, and synergistic approaches to providing better bibliographic control to networked resources. Every objective of the Plan acknowledges the importance of partnerships between libraries and a broad spectrum of other groups: metadata producers; standards developers; systems and software vendors; computing and technology suppliers; scholarly and academic enclaves; publishers; dot.com creators; bibliographic utilities; registration agencies; other information providers; government agencies; other libraries, including national libraries; and other stewards of cultural and historical knowledge, e.g., museums and archives.

It was clear throughout the Conference and in follow-up discussions that many of the recommendations would pertain not just to resources available on the World Wide Web, but to digital content available in other venues and even to certain non-digital materials as well. Nevertheless, we have retained the phrase "Web Resources" in the title of the Action Plan as a tie to the title of the Conference. Although a few of the action items in the Plan may not appear to be central to the original goals of the Conference, Conference participants proposed them with

such enthusiasm that we felt persuaded to include them in the Plan.

We reaffirm the value of all the recommendations stimulated by the Conference, although all do not appear as separate action items in the Plan. The original eleven sets of recommendations will remain intact on the Conference Website, so that any one can be easily resurrected or activated as circumstances may warrant. The Directorate is committed to accomplishing each action item in the Plan, using its own resources and seeking external assistance when necessary and appropriate. The Plan may be updated as lead organizations begin to work of individual action items in 2002.

The Cataloging Directorate appreciates comments it received, which have helped to improve the Plan.

Beacher J. Wiggins
Director for Cataloging
Library of Congress
Washington, DC
June 4, 2001
Rev. July 25, 2001
Rev. December 19, 2001

Library of Congress
December 20, 2001
Library of Congress Help Desk

Bibliographic Control of Web Resources:
A Library of Congress Action Plan

Note: To view the Conference 2000 Action Plan Forum summary from ALA Midwinter 2003, go to:
http://www.loc.gov/catdir/bibcontrol/highlights012603.pdf

To view the Conference 2000 Action Plan Forum summary from ALA Annual 2002, go to: http://www.loc.gov/catdir/bibcontrol/highlights061602.pdf

1 Increase the availability of standard records for selected Web resources.

1.1 Develop a plan to increase the creation and availability of standard records for electronic resources to include authority control and subject analysis.

Leader: Susan Vita **eMail:** svit@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator:
CMT Liaison: Susan Vita
Related Action Items: 2.2
Work plan available at:
Status: Ardith Bausenbach, Automation Planning and Liaison Office, LC, will serve as principal investigator for an environmental scan.

1.2 Explore ways to re-purpose/reuse metadata received under programs for registration, acquisitions, cataloging, copyright, and related activities.

Leader: John Celli **eMail:** jcel@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator:
CMT Liaison: John Celli
Related Action Items: NA
Work plan available at:

1.3   Compile/review/disseminate selection criteria for electronic resources to supplement traditional selection criteria (e.g., authorship, content, provenance, accuracy, relevance to institutional mission, and subject matter) used by libraries, archives and museums. Supplemental criteria include: design, use, timeliness, permanence, quality of links to other sites, value-added utility beyond print version, originating domain, downloading capability, uniqueness, reverse links, etc.

Leader: Carol Tobin   **eMail:**   cmtobin@email.unc.edu
Lead Organization: RUSA
Principal Investigator: Amy Tracy Wells
CMT Liaison: Susan Morris
Related Action Items: 4.4
Work plan available at: http://www.loc.gov/catdir/bibcontrol/1-3workplan.pdf
 Status: Done. Final report (March 2004) available at
 http://www.loc.gov/catdir/bibcontrol/selection_criteria.pdf

1.4 Design mechanisms to harvest, archive, and provide access to selected electronic government publications through partnerships with government agencies and/or academic institutions.

Leader: Taylor Surface   **eMail:**   surface@oclc.org
Lead Organization: OCLC Digital and Preservation Resources Division
Principal Investigator:
CMT Liaison: Judy Mansfield
Related Action Items: NA
Work plan available at: http://www.loc.gov/catdir/bibcontrol/1-4workplan.pdf

2 Enhance the access to and display of records for selected Web resources across multiple systems.

2.1   Support development of common user interfaces for searching, sorting, and retrieving relevant search results across a range of discovery tools. Identify desirable portal features and encourage the vendor community to provide recommended functionality. Promote adopting protocols and profiles as well as best practices for indexing. Serve as a forum for the exchange of information and concerns for the purpose of identifying ideas for improvement of portal applications.

Leader: John Byrum   **eMail:**   jbyr@loc.gov

Lead Organization: Library of Congress Portals Applications Issues Group (LCPAIG)

Principal Investigator:

CMT Liaison: John Byrum

Related Action Items: 6.4

Work plan available at: http://www.loc.gov/catdir/bibcontrol/2-1workplan.pdf

Status: The Library of Congress Portals Applications Issues Group (LCPAIG) was formed in autumn 2002 to search for portal products that would best meet the reference and research needs of LC staff and users and to promote LC Action Plan work item 2.1. The LCPAIG completed its initial project As of January 11, 2003, the group has begun preparation of a list of essential and desired features of an effective portal product. The group has also sponsored demonstrations and LC staff testing of two particular applications.

In addition, LCPAIG constructed a Web home page to further its efforts to promote communication of information regarding library portals. The URL for this resource is: http://www.loc.gov/catdir/lcpaig/paig.html [1/03]. This Web page lists the goals, tasks, and members of LCPAIG; presents a list of some selected portal products, with links to the Web pages of the vendors and the products themselves, and lists examples of portal systems used by libraries and links to selected Web resources that discuss issues regarding library portals in general. (Mention of and linking to portal products and their creators or vendors do not constitute an endorsement by the Library of Congress of any of the products, and are given on this Web page as a convenient nexus for anyone trying to find out more about them.)

On July 15, 2003, the LCPAIG posted its List of Portal Application Functionalities for the Library of Congress, First Draft for Public Comment. Announcement of its availability was widely distributed to interested groups, including vendors. Once updated to take into account comments received, a final version will be posted and the work of the LCPAIG in relation to work item 2.1 will be complete. The List of Portal Application Functionalities is available for comment at: http://www.loc.gov/catdir/lcpaig/portalfunctionalitieslist4publiccomment1st7-22-03revcomp.pdf

2.2   Promote the international sharing and collaborative use of "authority" information (authority records for names of persons, corporate bodies, works/expressions/manifestations/items, subjects, etc.--also called controlled vocabularies) starting with personal name authority records, launching a prototype of a virtual international authority file.

Leader: Barbara Tillett   eMail: btil@loc.gov
Lead Organization: LC CPSO
Principal Investigator:
CMT Liaison: Barbara Tillett
Related Action Items: 1.1, 3.7
Work plan available at: http://www.loc.gov/catdir/bibcontrol/2-2workplan.pdf
Status: Being fulfilled through LC participation and lead in the Virtual International Authority File project with OCLC and the Deutsche Bibliothek. That project is moving forward and has a 2-year timetable for the initial stages, with work already underway at OCLC.

2.3   Explore ways to enrich metadata records by focusing on providing additional subject and other access mechanisms (e.g., front-end user thesauri) and increasing granularity of access and display (e.g., by enabling progression through hierarchy and versions and by additional description information including summaries).

Leader: Judy Ahronheim   eMail: jaheim@umich.edu
Lead Organization: ALCTS TF
Principal Investigator: Marcia Bates
CMT Liaison: John Byrum
Related Action Items: 3.1, 6.2, 6.3
Work plan available at: http://www.loc.gov/catdir/bibcontrol/2-3workplan.pdf
Status: Marcia Bates has submitted the draft of her report, "Research and Design Review: Improving User Access to Library Catalog and Portal Information." Second draft, completed January 20, 2003,incorporated comments from METF and ALCTS TF members. At ALA Midwinter 2003, Bates presented ideas from her paper to the RUSA/LC Forum; METF met to develop a set of proposed activities intended to encourage the development of one or more of the proposals in the Bates report.   ALCTS TF accepted the final draft of the report.
Marcia Bates's report available at: http://www.loc.gov/catdir/bibcontrol/2.3BatesReport6-03.doc.pdf

2.4 **MERGED WITH ACTION ITEM 3.4**

2.5   Investigate making Library of Congress Classification and Subject Headings available at no cost on the Internet.

Leader: Kathryn Mendenhall   eMail: kmen@loc.gov
Lead Organization: LC CDS
Principal Investigator:
CMT Liaison: Kathryn Mendenhall
Related Action Items: NA
Status: Kathryn Mendenhall reported at ALA Annual in Atlanta (June 16,I 2002) that since CDS is a cost-recovery unit of the Library of Congress, it needed to pursue this work item while remaining mindful of its revenue stream. The purpose of this work item is the encouragement of

nontraditional applications of LCC and LCSH in networked environments. At present LCC and LCSH are distributed to two audiences, vendors/developers and cataloging practitioners, the hands-on users of cataloging tools; the Bicentennial Conference on Bibliographic Control for the New Millennium had shown that the Web developer community was potentially a major audience for these tools. Fostering the Web developer community's awareness of the classification and controlled subject vocabulary and improving the representation of the data from a technical viewpoint were both important. The most effective way to encourage use of these tools by the Web development community was to build on an existing model: CDS already distributes test files at no charge. It was now considering ways to send the full LCC and LCSH files via FTP as demonstration or test files and would work with LC CPSO and LC NDMSO to accomplish this while meeting cost recovery requirements.

3 Work collaboratively with metadata standards communities to improve bibliographic control of selected Web resources.

3.1 Develop and disseminate a widely–understandable paper that sets forth library principles for data content and structure for use by the metadata community. Disseminate it to the metadata community and encourage its use.

Leader: Susan Morris   **eMail:**   smor@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator: Sherry Vellucci
CMT Liaison: Susan Morris
Related Action Items: 2.3
Work plan available at: http://www.loc.gov/catdir/bibcontrol/3-1workplan.pdf
Status: PI intends the paper to describe principles of librarianship such as description, authority control, access, record structure, record interchange, and level of description in terms of granularity and is beginning by looking for common terminology. She plans to involve members of the metadata community as well as library leaders. She hopes to complete the principles paper in 2003 and looks forward to presenting it to a panel of invited reactors from the library and metadata communities at the Library of Congress.

3.2 Identify key metadata schemes to establish points of convergence among them, promote the consistent labeling of fields, and facilitate mapping of fields. Publicize mapping of fields.

Leader: Sally McCallum   **eMail:**   smcc@loc.gov
Lead Organization: LC NDMSO
Principal Investigator:
CMT Liaison: Sally McCallum
Related Action Items: NA

3.3 Provide a table indicating explicit linking techniques that currently are provided in AACR2, LCRIs, and in MARC 21, to use when linking a bibliographic, holdings, or authority record with a digital resource; linking between records for related resources; and linking records for manifestations of the same work/expression.

Leader: Barbara Tillett   **eMail:**   btil@loc.gov
Lead Organization: LC CPSO & NDMSO
Principal Investigator:
CMT Liaison: Barbara Tillett
Related Action Items: 2.4, 3.4, 3.5, 3.6, 6.5
Work plan available at: http://www.loc.gov/catdir/bibcontrol/3-3workplan.pdf
Status: CPSO will include CSSC in the discussions of future recommendations. The table showing linking techniques was circulated to the library community with deadline of October 15, 2002. To accommodate CSSC's timetable, the projected target has been extended to 2003.

3.4   Develop functional requirements to enable the interchange of manifestation records that support internal configurations for FRBR (IFLA Functional Requirements for Bibliographic Records) displays for multiple versions; determine supportive cataloging practices; determine any needed MARC 21 enhancements; communicate these to the vendor community.

Leader: Sally McCallum   **eMail:**   smcc@loc.gov
Lead Organization: LC NDMSO
Principal Investigator: Tom Delsey
CMT Liaison: Sally McCallum
Related Action Items: 2.4, 3.3, 3.5

3.5   Prepare guidelines for deciding when to create separate bibliographic records and when to create a single record for manifestations.

Leader: Barbara Tillett   **eMail:**   btil@loc.gov
Lead Organization: LC CPSO
Principal Investigator:
CMT Liaison: Barbara Tillett
Related Action Items: 2.4, 3.3, 3.4, 3.6, 6.5
Work plan available at: http://www.loc.gov/catdir/bibcontrol/3-5workplan.pdf
Status: Completed December 2000. LC CPSO posted its *Descriptive Cataloging Manual B19* (Draft Interim Guidelines for Cataloging Electronic Resources) on its Web site at http://lcweb.loc.gov/catdir/cpso/elec_res.html

3.6   Convey and reiterate the need for the continuing development of AACR2 to provide principles and practices for bibliographic access to and control of the full array of electronic resources on a timely basis and in harmony with other descriptive cataloging standards.

Leader: Beacher Wiggins   **eMail:**   bwig@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator:
CMT Liaison: Beacher Wiggins
Related Action Items: 3.3, 3.5, 6.5
Status: Done. The Joint Steering Committee for the Revision of AACR is incorporating into the planned 3rd ed. of *AACR* principles that more easily support the bibliographic control of web and other digital resources. The rationale for the new edition will result in a set of rules that will be more appealing as a tool for non-librarians; will be easier to use and interpret; will be more conducive for online search environments; will improve access to all media; and will enable easier integration with other resource description and retrieval standards. The projected publication date for the new edition is 2007.

3.7   Evaluate feasibility of assigning a persistent identifier or a naming system on an international scale. Develop and promote guidelines for shared resolving system.

Leader: Sally McCallum   **eMail:**   smcc@loc.gov
Lead Organization: LC NDMSO
Principal Investigator:
CMT Liaison: Sally McCallum
Related Action Items: 2.2

4 Develop automated tools for extracting, creating, harvesting and maintaining metadata to improve bibliographic control of selected Web resources.

4.1 Develop specifications for the creation and maintenance of records for titles contained in aggregator packages that will enable vendors to produce high-quality bibliographic data and accurate information about the volumes/dates of coverage of individual titles. In addition to the creation of original records, vendors must be able to provide customers with high-quality updated bibliographic records when bibliographic data and/or scope of coverage change significantly. Communicate the specifications to the vendor community and encourage their adoption. Communicate to the library community (especially public services and acquisitions librarians) about the importance of securing appropriate bibliographic control and maintenance as a component of subscribing to an aggregator package.

Leader: Adolfo Tarango **eMail:** atarango@ucsd.edu
Lead Organization: PCC SCA
Principal Investigator:
CMT Liaison: Maureen Landry
Related Action Items: NA
Work plan available at: http://www.loc.gov/catdir/bibcontrol/4-1workplan.pdf
Status: The work group is currently working to finalize a set of data elements which, extracted from a record of a physical manifestation of the resource (i.e. the record for the print) and modified or supplemented with additional data elements, would constitute an acceptable record for the online version found in an aggregator database. Since it is planned that these records will be added to the CONSER database, the group is determining the appropriate coding for the records so that their origin, level of authenticity, and quality can be readily ascertained by users of the records. We are working with OCLC to create an automated process for extracting/modifying/adding the data and are discussing which aggregator database to first experiment with.

4.2 Develop specifications for a tool that will enable libraries to extract metadata from Web-based resources in order to create catalog records and that will detect and report changes in resource content and bibliographic data in order to maintain those records. Communicate the specifications to the vendor community and encourage their adoption.

Leader: John Byrum **eMail:** jbyr@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator: Jane Greenberg
CMT Liaison: John Byrum
Related Action Items: NA
Work plan available at: http://www.loc.gov/catdir/bibcontrol/4-2workplan.pdf
Status: Final report is available at: http://www.loc.gov/catdir/bibcontrol/lc_amega_final_report.pdf

4.3 Develop specifications for embedded metadata that can be used by software developers to incorporate usable metadata into the output of their products. Target industries include developers of word processors, HTML editing tools, website development tools, image creation and manipulation tools, and multimedia production tools. Communicate these specifications widely in the appropriate forums, and encourage their adoption.

Leader: Stu Weibel   **eMail:**   stu_weibel@oclc.org
Lead Organization: DCMI
Principal Investigator:
CMT Liaison: Jeff Heynen
Related Action Items: 6.3
Work plan available at:

Status: OCLC Office of Research has engaged a consultant to assist in contacting vendors to promote the adoption of interoperable metadata facilities within their products. This work is in an early stage.

4.4   Develop specifications for a resource selection, evaluation and user feedback tool. Communicate the specifications to the vendor community and encourage their adoption.

Leader: To be determined   **eMail:**
Lead Organization: To be determined
Principal Investigator:
CMT Liaison: Susan Morris
Related Action Items: 1.3
Work plan available at:
Status: On hold pending completion of 1.3.

4.5   Promote convergence of standards for harvesting metadata.

Leader: Sally McCallum   **eMail:**   smcc@loc.gov
Lead Organization: LC NDMSO
Principal Investigator:
CMT Liaison: Sally McCallum
Related Action Items: NA

5   Provide appropriate training/continuing education to improve bibliographic control of selected Web resources.

5.1   Improve and enhance curricula in library and information science schools by (1) identifying and preparing students with core competencies for library technical services (e.g. interpersonal skills, partnering and analytical skills); (2) devising and conducting training to produce flexible and resourceful cataloging professionals with an appropriate mind set and values and advanced problem-solving, operations, management, and information technology skills; and (3) promoting the understanding and use of metadata standards (such as Dublin Core) for describing and managing electronic and digital resources, with the goal of enabling greater participation of new LIS professionals in the development and refinement of metadata standards used both within and outside libraries.

Leader: Beth Picknally Camden   **eMail:**   bpcamden@virginia.edu
Lead Organization: ALCTS TF
Principal Investigator: Ingrid Hsieh-Yee
CMT Liaison: Linda Stubbs
Related Action Items: NA
Work plans available at: http://www.loc.gov/catdir/bibcontrol/5-1newworkplan.pdf and http://www.loc.gov/catdir/bibcontrol/5-1workplan.pdf (completed work plan)
Status report available at: http://www.loc.gov/catdir/bibcontrol/5-1status.pdf The LIS Education Task Force submitted its final report to the ALCTS Task Force on the LC Plan in Dec. 2002. This task force approved and endorsed the final report on January 25, 2003, during ALA Midwinter Meeting. Also at Midwinter, members of the LIS task force reported to the ALISE Board. The board members supported the report, specifically the workshop proposed for January 2004, and made recommendations for working with their program committee.

Planning for Implementation: The LIS Education Task Force discussed plans for implementation of the action items from the report, and made recommendations to the ALCTS Task Force on the LC Plan on reconstituting the LIS task force as an implementation team with co-chairs from ALCTS and ALISE. ALCTS has charged a new task force, the ALCTS Task Force for Preparing Metadata and Cataloging Educators and Trainers, to implement action item 5.1. The co-chairs are C. Olivia Frost for ALISE and Diane Baden for ALCTS.

Ingrid Hsieh-Yee's report available at: http://www.loc.gov/catdir/bibcontrol/CatalogingandMetadataEducation.pdf
April 2004 quarterly update available.

5.2   Sponsor a series of open forums on metadata needs to support reference service in conjunction with various professional association meetings to include catalogers, reference librarians, vendors, systems developers, publishers, and administrators.

Leader: Carol Tobin   **eMail:**   cmtobin@email.unc.edu

Lead Organization: RUSA
Principal Investigator:
CMT Liaison: Susan Morris
Related Action Items: NA
Work plan available at: http://www.loc.gov/catdir/bibcontrol/5-2workplan.pdf
Status: The second RUSA/LC Forum on Metadata for Reference Needs, took place at ALA Midwinter Meeting in Philadelphia, January 26, 2003; featured speaker was Marcia Bates on her paper "Improving User Access to Library Catalog and Portal Information," prepared for the Metadata Enrichment Task Force (Action Plan work item 2.3). The third RUSA/LC Forum is scheduled to take place at ALA Annual Conference in Toronto, Sunday, June 22, 5:00-6:00 p.m., Metro Toronto Convention Centre, 715A/B.

5.3   Address continuing education needs for library technical services practitioners by (1) identifying and enhancing core competencies (e.g. analytical skills, collaborative and interpersonal skills) among library catalogers; (2) devising and conducting training to enhance practitioners' mind set and values, problem-solving, operations, management, and information technology skills; and (3) promoting the understanding, use, and refinement of metadata standards (such as Dublin Core) for describing and managing electronic and digital resources, with the goal of enabling greater participation in the development and refinement of metadata standards used both within and outside libraries.

Leader: Carol Hixson   eMail: chixson@oregon.uoregon.edu
Lead Organization: ALCTS TF
Principal Investigator:
CMT Liaison: Cynthia Johanson
Related Action Items: NA
Work plan available at: http://www.loc.gov/catdir/bibcontrol/5-3workplan.pdf
Status: See the Continuing Education Task Force's Web site at:
http://darkwing.uoregon.edu/~chixson/cetf/CETFHome.html
Final report of the Task Force (August 8, 2003) is available at:
http://darkwing.uoregon.edu/~chixson/cetf/CETF_Final_Report.pdf The Continuing Education Implementation Group (CEIG), chaired by Marty Kurth (Cornell University), is to follow up the work of the Continuing Education Task Force. The CEIG workplan is available at:
http://www.loc.gov/catdir/bibcontrol/5-3ceigworkplan.pdf
Current status report (May 2004)

6 Support research and development on emerging metadata standards and address the challenges of interoperability to improve bibliographic control of selected Web resources.

6.1 Support relevant Library of Congress research and development on digital initiatives.

Leader: Susan Morris **eMail:** smor@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator:
CMT Liaison: Susan Morris
Related Action Items: NA
Status: This work item is being fulfilled through the LC report to the Digital Library Federation, which is published in the *DLF Newsletter* , available at http://www.diglib.org/publications.htm

6.2 Research user needs and approaches in accessing the catalog and other discovery tools in a networked environment to develop user tools for customization.

Leader: Lorcan Dempsey **eMail:** lorcan_dempsey@oclc.org
Lead Organization: OCLC Office of Research
Principal Investigator:
CMT Liaison: John Byrum
Related Action Items: 2.3
Work plan available at:

6.3 Support research and development to improve controlled vocabulary mediating tools, including a simplified LCSH.

Leader: Ed O'Neill **eMail:** ed_oneill@oclc.org
Lead Organization: OCLC Office of Research
Principal Investigator:
CMT Liaison: Tom Yee
Related Action Items: 2.3, 4.3
Work plan available at: http://www.loc.gov/catdir/bibcontrol/6-3workplan.pdf

Status: FAST (Faceted Application of Subject Terminology) is an adaptation of the Library of Congress Subject Headings in a simplified syntax. It retains the rich vocabulary of the Library of Congress's Subject Heading s in a faceted schema that is easier to understand, control, apply, and use. The initial validation of the topical, form (genre), chronological, and personal names facets is complete. The validation of the geographics facet is currently underway and work on the remaining three facets – corporate names, conference/meetings names, and uniform titles – will begin this fall. A proposal to modify the MARC 21 bibliographic and authority formats to accommodate FAST was approved by MARBI during the 2002 ALA Annual Conference, permitting the creation of the first FAST authority records this fall. It is expected that the initial version of the FAST authority file will be complete in the spring of 2003. More information is available at

http://www.oclc.org/research/projects/fast/

6.4 Support research and development on the changing nature of the catalog to include consideration of a framework for its integration with other discovery tools.

Leader: John Byrum **eMail:** jbyr@loc.gov
Lead Organization: Director for Cataloging
Principal Investigator:
CMT Liaison: John Byrum
Related Action Items: 2.1
Work plan available at:
Status: On hold pending appointment of Principal Investigator.

6.5 MERGED WITH ACTION ITEM 3.6

Appendix I: Abbreviations

Abbreviation	Name
AACR	Anglo-American Cataloguing Rules
ALA	American Library Association
ALCTS	ALA Association for Library Collections & Technical Services
ALCTS TF	Association for Library Collections & Technical Services Task Force on the LC Action Plan for Bibliographic Control of Web Resources
ALISE	Association for Library and Information Science Education
ARL	Association of Research Libraries
CDNL	Conference of Directors of National Libraries
CDS	LC Cataloging Distribution Service
CIP	Cataloging in Publication
CSSC	ALCTS Serials Section Committee to Study Serials Cataloging
CPSO	LC Cataloging Policy and Support Office
DCMI	Dublin Core Metadata Initiative
FAST	Faceted Application of Subject Terminology, a project of the OCLC Office of Research
IFLA	International Federation of Library Associations and Institutions
LCC	Library of Congress Classification
LCSH	Library of Congress Subject Headings
NDMSO	LC Network Development & MARC Standards Office
OCLC	Online Computer Library Center, Inc.
PAIG	LC Portals Applications Interest Group
PCC SCA	Program for Cooperative Cataloging Standing Committee on Automation
RUSA	ALA Reference and User Services Association

The document

Cataloging for the 21st Century:

A Proposal for Continuing Education for

Cataloging Professionals

has been moved to a more stable location within the University of Oregon's institutional repository, Scholars' Bank. Please click on the link below to
be taken to its archival location:
https://scholarsbank.uoregon.edu/dspace/handle/1794/986

Continuing Education for Catalogers:
Survey

**This survey has been designed by members of the ALCTS Continuing Education Task Force
(LC Action Plan Item 5.3) to assist them in outlining a continuing education curriculum for catalogers. Personal or institutional information will be used only to establish a context or to enable Task Force members to follow up with respondents to clarify an answer. No information will be linked to any individual person or institution.**

Contact Carol Hixson, Chair of the Task Force, if you have questions about the form or its use.

THANK YOU for your help!

Please answer the following questions as completely as you can.

- 1. Name:

- 2. Job title:

- 3. Institution where employed:

- 4. Email address:

- 5. Type of library where you work:

- 6. Does your institution have an OPAC?

- 6a. Can your OPAC support non-MARC records?

- 6b. Does your institution include non-MARC records in its OPAC?

- 7. What other metadata standards (besides MARC) are used in your institution's OPAC or other catalogs and databases? (Check all that apply)
    - o   Dublin Core
    - o   EAD
    - o   VRA Core
    - o   GIS
    - o   METS
    - o   GILS
    - o   TEI
    - o   Geospatial
    - o   Local
    - o   Other (give details below)

- 8. Who (what levels of staff and from what areas) is defining and/or applying the metadata standards? (Check all that apply)
    - o   Paraprofessional staff
    - o   Librarians
    - o   Catalogers
    - o   Reference
    - o   Collection Development/Subject Specialists
    - o   Volunteers
    - o   Student Assistants
    - o   Other (give details below)

- 9. Has your institution undertaken or begun planning or discussions for an institutional repository?

- 10. Does your institution partner with any other department or group on your campus or in your community on a digital project?

- 11. Is your institution currently undertaking or planning any digital projects?

- 11a. If yes, what types? (Check all that apply)
    - Electronic dissertations
    - Visual/Image collections
    - Scanned or digitized text
    - Sound
    - Electronic reserves
    - Other (give details below)

- 12. Are records for the digital collections being added to your OPAC?

- 12a. If yes, are they:

- 13. Does your institution employ any controlled vocabularies to describe materials in its digital collections?

- 13a. If yes, what is the source of the controlled vocabulary. (Check all that apply)
    - Library of Congress Subject Headings
    - Art and Architecture Thesaurus
    - Medical Subject Headings
    - Sears

- ○ Thesaurus for Graphical Materials
- ○ Local
- ○ Other (Give details below)

- 14. Does your institution apply any type of authority control for names or titles when describing materials in its digital collections?

- 14a. If yes, what is the source of the authorized headings? (Check all that apply)
    - ○ Library of Congress Name Authority File
    - ○ Art and Architecture Thesaurus
    - ○ Getty Thesaurus of Geographic Names
    - ○ Local
    - ○ Other (Give details below)

- 15. Are cataloging librarians or staff involved in any digital projects in your institution?

- 15a. If yes, what roles do they play? (Check all that apply)
    - ○ Consultation
    - ○ Marking up records
    - ○ Inputting data
    - ○ Determining metadata standards or elements
    - ○ Scanning/Digitizing
    - ○ Creating or maintaining Web pages for the collections
    - ○ Designing search interfaces
    - ○ Programming
    - ○ Setting up or designing databases
    - ○ Other (Give details below)

- 16. What technical skills or knowledge of which standards do you think catalogers need today and in the near future
  to be prepared to provide access to electronic/digital resources? (Check all that apply)
  - ○ MARC
  - ○ Dublin Core
  - ○ XML
  - ○ HTML
  - ○ EAD
  - ○ Web authoring/design software
  - ○ Digital library software
  - ○ Scanning/digitization tools
  - ○ OAI
  - ○ AACR2
  - ○ Thesaurus design/principles
  - ○ MODS
  - ○ Powerpoint
  - ○ Word processing
  - ○ Programming languages
  - ○ Other (Give details below)

- 16a. For the skills that you checked above, please describe below the level of expertise you consider
  necessary, from basic awareness up to mastery.

- 17. What **non-technical** skills, qualities, or knowledge do you think catalogers need today and in the near future
  to be prepared to participate effectively in digital projects? (Check all that apply)
    - ❍ Presentation skills
    - ❍ Team-building
    - ❍ Time management
    - ❍ Workflow analysis
    - ❍ Project leadership
    - ❍ Statistical analysis
    - ❍ Negotiation skills
    - ❍ Other (Give details below)

- 18. What do you consider the chief obstacles to enabling catalog librarians and staff to acquire new skills? (Check all that apply)
    - ❍ Not enough time
    - ❍ Training not available on needed topics
    - ❍ Training not available in convenient location
    - ❍ No opportunities for practical application
    - ❍ Not enough money
    - ❍ Personal resistance
    - ❍ Resistance from the institution
    - ❍ No support for new priorities
    - ❍ Narrow view of job responsibilities
    - ❍ Stagnant skills
    - ❍ Inadequate institutional infrastructure or technical support
    - ❍ Other (Give details below)

- 19. Special Information:
  (Include here any information that you were unable to provide in the questions above.)

this request and prompt for another,   the form.

Last updated: March 5, 2003 by
[Carol Hixson](#)

Continuing Education for Catalogers:
Summary of Survey Responses

This survey was designed by members of the ALCTS Continuing Education Task Force (LC Action Plan Item 5.3) to assist them in outlining a continuing education curriculum for catalogers.
The following summary does not provide full details of all survey responses.
The Continuing Education Task Force has access to the complete range of responses

Contact [Carol Hixson](), Chair of the Task Force, if you have questions about the survey or its use.

THANK YOU to everyone who responded to the survey.

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Percentages below add up approximately to 100%, except for those questions where respondents were able to choose more than one option For those questions, percentages listed for each option are not meant to be added together as a total. Responses are listed from highest to lowest percentage, in descending order.

Please answer the following questions as completely as you can.

- 1. Name:
  Personal or institutional information has been removed from the survey responses.

- 2. Job title:
  Personal or institutional information has been removed from the survey responses.

- 3. Institution where employed:
  Personal or institutional information has been removed from the survey responses.

- 4. Email address:
  Personal or institutional information has been removed from the survey responses.

- 5. Type of library where you work:
  - College or university (64.2%)
  - Public (11.8%)

- ❍ Special (10.2%)
- ❍ Other (musem, theological, law) (4.8%)
- ❍ Government (3.7%)
- ❍ Corporate (2.1%)
- ❍ Not a library (2.1%)
- ❍ School (1.1 %)

- 6. Does your institution have an OPAC?
  - ❍ Yes (100%)

- 6a. Can your OPAC support non-MARC records?
  - ❍ Yes (36.9%)
  - ❍ Don't know (29.9%)
  - ❍ No (28.3%)
  - ❍ Other (3.7)
  - ❍ No answer (1.1%)

- 6b. Does your institution include non-MARC records in its OPAC?
  - ❍ No (59.9%)
  - ❍ Yes (24.6%)
  - ❍ Don't know (10.2%)
  - ❍ Other (3.2%)
  - ❍ No answer (2.1%)

- 7. What other metadata standards (besides MARC) are used in your institution's OPAC or other catalogs and databases? (Check all that apply)
  - ❍ Dublin Core (27.8%)
  - ❍ Local (18.2%)
  - ❍ EAD (13.4%)
  - ❍ Other (7%)
  - ❍ TEI (4.8%)
  - ❍ METS (3.8%)
  - ❍ VRA Core (3.2%)
  - ❍ GIS (2.7%)
  - ❍ Geospatial (2.7%)

- 8. Who (what levels of staff and from what areas) is defining and/or applying the metadata standards? (Check all that apply)
  - ❍ Catalogers (72.2%)
  - ❍ Librarians (57.8%)
  - ❍ Paraprofessional staff (35.3%)
  - ❍ Reference (8.6%)

- ❍ Other (8%)
- ❍ Collection Development/Subject Specialists (8%)
- ❍ Student Assistants (5.9%)
- ❍ Volunteers (3.7%)

- 9. Has your institution undertaken or begun planning or discussions for an institutional repository?
  - ❍ No (44.3%)
  - ❍ Yes (27.8%)
  - ❍ Don't know (24%)
  - ❍ Other (2.1%)
  - ❍ No answer (1.6%)

- 10. Does your institution partner with any other department or group on your campus or in your community on a digital project?
  - ❍ No (45.7%)
  - ❍ Yes (36.3%)
  - ❍ Don't know (11.7%)
  - ❍ No answer (4.2%)
  - ❍ Other (2.1%)

- 11. Is your institution currently undertaking or planning any digital projects?
  - ❍ Yes (63.6%)
  - ❍ No (21.9%)
  - ❍ Don't know (10.2%)
  - ❍ Other (2.7%)
  - ❍ No answer (1.6%)

- 11a. If yes, what types? (Check all that apply)
  Percentages below are for those who answered YES to question 11.
  - ❍ Scanned or digitized text (75%)
  - ❍ Visual/Image collections (70.2%)
  - ❍ Electronic reserves (53.2%)
  - ❍ Electronic dissertations (23.4%)
  - ❍ Sound (21%)
  - ❍ Other (4%)

- 12. Are records for the digital collections being added to your OPAC?
  Percentages below are for those who answered YES to question 11.
  - ❍ Yes (57.3%)
  - ❍ No (21%)
  - ❍ Don't know (10%)

- Other (10%)
- No answer (1.6%)

- 12a. If yes, are they:
  Percentages below are for those who answered YES to question 12.
  - Both (54.9%)
  - Item-level (23%)
  - Collection-level (15.4%)
  - Other (5.6%)
  - Don't know (1.1%)

- 13. Does your institution employ any controlled vocabularies to describe materials in its digital collections?
  Percentages below are for those who answered YES to question 11.
  - Yes (67.7%)
  - Don't know (13.7%)
  - No (10.5%)
  - No answer (8.1%)

- 13a. If yes, what is the source of the controlled vocabulary. (Check all that apply)
  Percentages below are for those who answered YES to question 13.
  - Library of Congress Subject Headings (96.4%)
  - Local (34.5%)
  - Thesaurus for Graphical Materials (17.9%)
  - Other (such as: Canadian Subject Headings, GNIS, GSAFD, Index of Christian Art, WPA index, Répertoire de vedettes-matière, DCMI Type Vocabulary, Unesco (17.9%)
  - Art and Architecture Thesaurus (14.3%)
  - Medical Subject Headings (10.7%)

- 14. Does your institution apply any type of authority control for names or titles when describing materials in its digital collections?
  Percentages below are for those who answered YES to question 11.
  - Yes (66.9%)
  - No (13.7%)
  - Don't know (9.6%)
  - No answer (7.3%)
  - Other (2.4%)

- 14a. If yes, what is the source of the authorized headings? (Check all that apply)
  Percentages below are for those who answered YES to question 14.
  - Library of Congress Name Authority File (94%)
  - Local (32.5%)

- ❍ Other (such as: Kinetica (ANB), Candiana) (6%)
- ❍ Art and Architecture Thesaurus (4.8%)
- ❍ Getty Thesaurus of Geographic Names (1.2%)

- 15. Are cataloging librarians or staff involved in any digital projects in your institution?
  Percentages below are for those who answered YES to question 11.
  - ❍ Yes (79%)
  - ❍ No (16.1%)
  - ❍ Don't know (2.4%)
  - ❍ Other (1.6%)
  - ❍ No answer (.8%)

- 15a. If yes, what roles do they play? (Check all that apply)
  Percentages below are for those who answered YES to question 15.
  - ❍ Consultation (70.4%)
  - ❍ Determining metadata standards or elements (58.2%)
  - ❍ Inputting data (56.1%)
  - ❍ Marking up records (43.9%)
  - ❍ Scanning/Digitizing (19.4%)
  - ❍ Creating or maintaining Web pages for the collections (23.5%)
  - ❍ Setting up or designing databases (23.5%)
  - ❍ Designing search interfaces (13.3%)
  - ❍ Other (10.2%)
  - ❍ Programming (2%)

- 16. What technical skills or knowledge of which standards do you think catalogers need today and in the near future
  to be prepared to provide access to electronic/digital resources? (Check all that apply)
  - ❍ MARC (96.8%)
  - ❍ AACR2 (90.4%)
  - ❍ Dublin Core (78.6%)
  - ❍ XML (73.3%)
  - ❍ HTML (65.2%
  - ❍ Scanning/digitization tools (59.4%)
  - ❍ Thesaurus design/principles (50.2%)
  - ❍ Digital library software (49.7%)
  - ❍ Web authoring/design software (44.9%)
  - ❍ EAD (39.6%)
  - ❍ Powerpoint (30.5%)
  - ❍ OAI (23%)
  - ❍ MODS (16.6%)
  - ❍ Programming languages (16.6%)
  - ❍ Other (such as: database packages, UNIX/LINUX, GILS, METS, OpenURL,

ONIX, VRA Core, SQL) (7.5%)

- 16a. For the skills that you checked above, please describe below the level of expertise you consider
  necessary, from basic awareness up to mastery.
  Answers varied considerably, with mastery being preferred for most of the top vote getters.

- 17. What **non-technical** skills, qualities, or knowledge do you think catalogers need today and in the near future
  to be prepared to participate effectively in digital projects? (Check all that apply)
  - Workflow analysis (78.7%)
  - Team-building (74.3%)
  - Project leadership (72.7%)
  - Time management (70.1%)
  - Negotiation skills (60.4%)
  - Presentation skills (56.7%)
  - Statistical analysis (40.1%)
  - Other (Such as: grant writing, wriiten communication, patience, humor,
    managing people, budgeting, running meetings, consensus building) (13.9%)

- 18. What do you consider the chief obstacles to enabling catalog librarians and staff to acquire new skills? (Check all that apply)
  - Not enough time (75.4%)
  - Not enough money (69%)
  - Training not available in convenient location (66.8%)
  - Training not available on needed topics (47.1%)
  - Narrow view of job responsibilities (39.6%)
  - Inadequate institutional infrastructure or technical support (38%)
  - No support for new priorities (32.6%)
  - No opportunities for practical application (30.5%)
  - Resistance from the institution (29.4%)
  - Personal resistance (22.5%)
  - Stagnant skills (20.8%)
  - Other (7.5%)

- 19. Special Information:
  (Include here any information that you were unable to provide in the questions above.)
  Answers to this question were detailed and varied greatly.

March 31, 2003 by
[Carol Hixson](#)

Embedded Secure Document

The file *http://www.loc.gov/catdir/bibcontrol/CatalogingandMetadataEducation.pdf* is a secure document that has been embedded in this document. Double click the pushpin to view.

Topical Discussion Group 2: What Are the Continuing Education Needs of Professional Catalogers?

Facilitator: Sheila Intner, Professor, Simmons College Graduate School of Library & Information Science
Recorder: Allene Hayes, Library of Congress
Members: Judith Cannan, Cliff Cohen, Carol Hixson, Cynthia Johanson, Lee Leighton, Ichiko Morita, Sybil Moses, Ann Sandberg-Fox, Susan Vita, Thompson Yee

The Assignment

The Topical Discussion Group (**TDG**) was asked to develop a list of recommended continuing education opportunities that technical services administrators in academic libraries could use to meet the more immediate education needs of their professional catalogers. Such educational opportunities might be provided by library schools, workshops organized by professional groups or organizations, and/or take the form in-house training. The list would be useful both in the short term, for use by academic libraries currently expanding their uses of Web resources or undertaking digital projects, and in the long term in connection with future activities.

This assignment grows out of the challenges to catalogers today in providing bibliographic control for remote-access online resources, which did not exist even a few years ago. New competencies are being required that go beyond cataloging and classification to include a broader spectrum of knowledge organization structures and systems, such as database design, indexing and abstracting principles, and information retrieval.

Recommendations

The TDG divided its recommendations into five categories: Mindset and Values, Consensus on Core Competencies, Toolkit, Managing Operations, and Mechanisms. Within each category the group identified three to five recommendations as primary; these are marked with an asterisk in the list below:

2.1.   Mindset and Values
* 2.1a.   Learn, unlearn, relearn (career-long learning)
         Sheila Intner said at the plenary session that in a digital age, all catalogers will need "to unlearn things we thought were true and relearn new things" throughout their careers.
* 2.1b.   Refocusing on access/intellectual access ("instead of agonizing over description," Prof. Intner elaborated)
* 2.1c.   Setting priorities
  2.1d.   Behavioral psychology
  2.1e.   Accepting data from other sources
  2.1f.   Archiving/Maintenance

2.2.   Core Competencies consensus

* 2.2a.   Flexible
* 2.2b.   Judgement/evaluative skills
* 2.2c.   Analytic skills
  2.2d.   Cooperation
  2.2e.   Interpersonal skills
  2.2f.   Negotiation skills
  2.2g.   Virtual team for collection development
  2.2h.   Initiative
  2.2i.   Evaluative skills
  2.2j.   Partnering skills
  2.2k.   Setting priorities
  2.2l.   Responsibility/Accountability
  2.2m.   Tolerance of criticism/Risk taking
  2.2n.   Raise self esteem

2.3.   Toolkit
* 2.3a.   Advanced computing skills
* 2.3b.   Finding data from other sources
* 2.3c.   Cost benefit analysis
* 2.3d.   Metadata schemes
  2.3e.   Characteristics of new media
  2.3f.   Finding data from other sources
  2.3g.   Maintenance (archiving and preservation)
  2.3h.   Tolerant of criticism/Risk taking
  2.3i.   Awareness of standards
  2.3j.   Harvesting data
  2.3k.   Vocabulary of partners
  2.3l.   Research skills
  2.3m.   Cost benefit analysis

2.4.   Managing Operations
* 2.4a.   Partnering skills
* 2.4b.   Marketing skills
* 2.4c.   Balancing old and new
  2.4d.   Ongoing maintenance (archiving and preservation)
  2.4e.   Learn, unlearn and relearn
  2.4f.   Value own work (intellectual capital)
  2.4g.   Supervision and training skills
  2.4h.   Cost benefit analysis
  2.4i.   Workflow analysis

2.5.   Mechanisms
* 2.5a.   Clearinghouse for workshops

* 2.5b.   Clearinghouse for experimentations
* 2.5c.   International/Global/Universal
* 2.5d.   Demonstrate/Share professional learning and development
* 2.5e.   Acceptance of Web-based training

Discussion

Sheila Intner presented the TDG's recommendations and commented that the group had developed many more recommendations than could be discussed at the plenary session.

In comments from the audience, Marcia Bates said that, although the TDG recommendations were geared toward on-the-job training, they would also be appropriate for courses in schools of library and information science. Bella Hass Weinberg said that an additional skill for the toolkit is the ability to design a classification scheme or a thesaurus; Prof. Intner said that she agreed in principle. Barbara Tillett said that the scope of this list of training needs should be broadened to include all library professionals and library computer scientists.

Post Conference Comments from Participants

Comment/question(paraphrased) from Barbara Tillett: Why is cost/benefit analysis repeated across categories, as well as within categories? Response from Sheila Intner: "We wanted to emphasize not only the skill itself (in the toolkit) but [also] those areas where it should be applied. If the group wishes to delete it, it should remain in the toolkit and be changed to 'financial skills' under the core competencies."

12/29/00

Topical Discussion Group 8: How Can Libraries Participate More Actively in the Development of Metadata Standards?

Facilitator: Sally Sinn, Associate Director, Technical Services Division, National Agricultural Library
Recorder: Ardith Bausenbach, Library of Congress
Members: Henriette Avram, Lynn Connaway, Stuart Ede, Jonathan Furner, Lynne Howarth, Ingrid Hsieh-Yee, Carl Lagoze, Sally McCallum, Vianne Sha, Barbara Tillett

The Assignment

The Topical Discussion Group (**TDG**) had a dual assignment: to develop a prioritized list of recommended actions that academic and research libraries, in particular, could undertake towards becoming more actively involved in working with the metadata community on the development of metadata standards; and to identify areas of cataloging/resource description and discovery where there is a need for the cooperative participation of the library and metadata communities to develop metadata standards, whether emerging or long-established. This assignment arose partially in response to the National Academy of Sciences (NAS) report *LC21: A Digital Strategy for the Library of Congress,* which said it was of critical importance for the Library (and by extension the library community) to become much more actively involved with the metadata community in addressing the development and evolution of metadata standards.

Recommendations

Sally Sinn told the Conference plenary session that as a means of prioritizing, the TDG had divided its recommendations into those for *actions that should begin now* and those *for ongoing activities.*

Recommendations for Actions to Begin Now

8.1.   Commission a widely understandable principles/models paper to describe the library perspective (for contents rules, authority lists, etc.) in the overall metadata environment, with the goal of providing a coherent message for our community. Ms. Sinn noted, "Right out of the box, it would be useful to commission a model that includes the guidelines for data content and structure for those desiring to establish metadata for communicating and integrating information about Web resources."

8.1a.   Convene a small meeting of selected representatives from key communities (computer scientists, bibliographic control specialists, and metadata experts) to address the problems of finding a common vocabulary and determining a common ground on how to proceed.

8.1b.   Encourage the use, understanding, and refinement of existing standards for Web resources (such as Dublin Core) through education, targeted outreach, etc.

Recommendations for Ongoing Activities

8.2.   Investigate opportunities for collaboration to organize a library voice in other communities' metadata activities, and vice versa. These communities include:

>   publishers (with ONIX/EPICS)
>   museums (with CIDOC)
>   scholarly publishers and authors
>   W3C (World Wide Web Consortium) (including RDF activities)
>   search engine producers

8.3.   Actively promote the use of authority files for names (personal, corporate, geographic), uniform titles, subject terms, and classification systems. Ms. Sinn said the TDG felt that "the logical starting point is to support the IFLA proposals relating to establishment of an international authority file."

8.4.   Initiate action to fill the gaps in developing standards for metadata, including metadata for rights management, preservation, link management, persistent naming, and repository structures. Specific steps include:

8.4a.   Involve U.S. Copyright Office in rights management activities.

Post Conference Comments from Participants

From Barbara Tillett: "I ... wanted to add 3 comments with some updates on the recommendations ....

"1. Under "Recommendations for Actions to Begin Now" is the call for a widely understandable principles/models paper to describe the library perspective (for contents rules, authority lists, etc.) in the overall metadata environment, with the goal of providing a coherent message for our community." The Joint Steering Committee for Revision of AACR has been working on a principles document to include as part of the new introduction to the rules and hope to have the draft more widely available for comment around their April meeting (I'm working on it).

So far we have a rough draft for a base set of principles for developing cataloging rules, and I hope to expand this to more general principles for content rules, authority records, etc., as discussed on the LC Bicentennial Conference's TDG.

"2. At the end of Group No. 8's paper (Recommendations for Ongoing Activities) there is the recommendation: "Actively promote the use of controlled vocabularies to enhance the use of the Web." May I suggest clarifying that we are speaking about authority files for names (personal, corporate, geographic), uniform titles, subject terms, and classification systems. Anything else we intended to include?

"3. Also, there have been interesting developments regarding the IFLA proposal relating to establishment of an international authority file - I believe IFLA will explore both a "virtual" international authority file where national files are linked using Z39.50 (expanding the Bath Profile to include authority records) - e.g., the MALVINE-LEAF* project in Europe will be using Z39.50, and also the possibility of a union authority file created using such tools as the Open Archives Initiative's automated metadata harvesting techniques. These ideas are definitely still evolving and quite exciting.

*(from notes from Becky Dean of OCLC on the recent MALVINE-LEAF Conference): "LEAF is the acronym for "Linking and Exploring Authority Files", and is a project funded by the European Commission. The project is slated to start in Spring 2001, and end in the Spring of 2004." More on MALVINE (pronounced (mal-veen)):
http://www.malvine.org/malvine/eng/index.html"

  Reply from Sally Sinn to Barbara Tillett: "... I agree with your suggested clarification in #2 ... regarding an inclusive range of authority files and would recommend substituting your wording   ' ... actively promote the use of authority files for names (personal, corporate, geographic), uniform titles, subject terms, and classification systems.' We can then delete the following statement of what 'controlled vocabularies' was intended to include. [Change to text subsequently made.]

<div align="right">12/27/00</div>

Serial Cataloging Cooperative Training Program

Schedule of Workshops | **Guidelines for sponsors** | **Lists of Trainers**
Need Assessment Form | **Pre- and Post Class Exercises**

Schedule of Workshops:

Serial Holdings
Basic Serials
Electronic Serials
Advanced Serials
Integrating Resources

Workshop descriptions and ordering from CDS

Photos from the SCCTP Advanced Serials Cataloging Workshop held in Montgomery Aug.24-25, 2005

Comments on the Basic Serials Cataloging Workshop

About SCCTP

What is SCCTP?

Goals

How SCCTP Works

Bibliography

Report on Distance Learning

Sponsoring a Workshop

Guidelines for sponsors Registration, training manuals, certificates, etc.

Lists of Trainers

Needs Assessment Form

Pre- and Post-Class Exercises

Train-the-trainer program

Please send workshop evaluations and any comments to:

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Serial Record Division
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Voice: 202 707-5185
Fax: 202 707-1778

Please send notification of workshops you are teaching or sponsoring to:

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