RAILS Consortia Cataloging Competencies and Training Recommendations

Introduction

The RAILS Cataloging Working Group has identified a need for more cataloging training in general across RAILS consortia libraries, with the need most critical in basic skills. In general, consortial needs exceed their ability to provide services, especially regarding training and standardization – areas that are particularly important in supporting the ongoing quality of a shared database. Some consortia partially mitigate the need for local library staff to work with bibliographic records in the ILS through centralized cataloging staff, but each consortium member library still has some level of interaction with cataloging records. Though cataloging-focused staffing is being reduced at many libraries due in part to increased outsourcing, the need for in-house staff has not gone away. Additionally, a trend toward merging circulation and technical services departments has led to many staff assuming cataloging responsibilities without formal cataloging education.

It is important for cataloging staff to continually develop their skills to more advanced levels, and in new directions, as the field continues to shift. The future of the ILS, evolution of discovery platforms and methods, and other disruptive forces in libraries and working with library data will impact all libraries and the roles of these individuals in particular. The pace of this change will vary depending on the organization. The Cataloging Working Group recommends the development of a core training curriculum for basic cataloging skills, supplemented with a strong program of cataloging workshops on more advanced and future-focused topics.

In developing the desired competencies and structural recommendations, members of the Cataloging Working Group had a series of conversations synthesizing their perspectives as working professionals in consortia, discussions within their professional networks, the 2004 Illinois Statewide Cataloging Standards, surveys of consortia and LLSAP member libraries conducted by RAILS, and the ALCTS Core Competencies for Cataloging and Metadata Professionals.

All recommendations are system-agnostic and intended specifically for libraries in consortia, though many of the principles can be applied universally and RAILS may want to consider the potential audience for training to be a mixture of staff at consortium member libraries as well as standalone libraries.

Basic Training Curriculum

The Cataloging Working Group recommends a program of cataloging training with the following characteristics and structure.

- Curriculum in basic cataloging skills with a plan for ongoing maintenance
  - Developed, coordinated, and/or delivered via a mix of outside contracted work and in-house RAILS staff, with feasibility to be determined by RAILS. The Working Group suggests that the curriculum be developed and sessions be delivered (at least initially) by an outside provider, with the program to be managed and maintained primary by RAILS staff leveraging limited consulting as needed.
  - Recurring – quarterly or twice a year
  - Connected to consortial cataloging standards, national standards, etc.
  - Connected to other sources of training, networking groups and peer resources, etc.
  - Include course descriptions with prerequisites
  - Include certificates of completion or other proof of completion
- Content would be basic and rooted in established standards and best practices
  - MARC and RDA basic training
  - Focus of curriculum will be in developing and maintaining basic and intermediate skills, with advanced training to be considered supplementary
  - Alignment with levels described below as well as best practices and standards recommendations
  - Supplementary single sessions: handling non-OCLC records, electronic content, authority control, etc.
- Delivered in a variety of modes
  - Live training is essential – would need to be repeated at multiple sites and/or offered via Polycom
  - Include self-guided component – training handbook, videos, worksheets, recordings of live training, etc.
  - Explore partnerships with other groups and organizations (such as LACONI or MCLS) for certain sessions
- Strong promotion strategies will be key

Competency Levels

These levels are general recommendations and are open to interpretation based on local practices and staffing structures at individual libraries. They supplement and update the Illinois Statewide Cataloging Standards established by the Illinois State Library in 2004, and use the category terminology established there. The categories were developed to reflect likely divisions of responsibility across multiple cataloging staff; job titles are entirely local decisions and will vary widely. Education levels noted here are used as examples, not requirements, and will not be consistent across types and sizes of libraries. Training for each level should include context for how their tasks fit into the library and the importance of following consortium guidelines.

Barcoder

Most basic level. Not likely to have an LTA or other library degree; may have other library experience. Work is focused on data entry and involves matching items to existing bibliographic records. Should be able to identify basic fields in a bib record and identify issues.

Copy Cataloger

May have an LTA but likely not an MLS; likely has library experience. Work is focused on item-level, rather than bibliographic-level information, and involves matching items, making edits to existing bibliographic records, and could involve authority control. May work in a single format, and may assign Dewey and fiction call numbers. Should be able to identify fields in a bibliographic record and correct issues.

Original Cataloger

Likely has an MLS and should have library experience. Work involves matching items, making edits to bib records, authority control, classification, creating original bibliographic records, and may include supervisory responsibilities.

Competency	Barcoder	Copy Cataloger	Original Cataloger
Understands basic cataloging terminology	X	X	X
Knows where to look on the resource for cataloging information, i.e., the prescribed sources of information	X	X	X
Understands the basics of a MARC record	X	X	X
Understands the basics of RDA	X	X	X
Understands the definition and content of item and bibliographic records	X	X	X
Knows how to choose the correct bibliographic record that matches an item	X	X	X
Knows how to add an item and any necessary fields to item record (according to library or consortium guidelines); may include adding call numbers	X	X	X

Able to identify problems with the database or a record that should be reported to their supervisor	X	X	X
Has a basic understanding of RDA and descriptive cataloging		X	X
Has a basic understanding of MARC and how RDA principles translate into MARC		X	X
Has a basic understanding of OCLC or other source of bibliographic records in use locally, and how to identify records to be transferred into their local database.		X	X
Understands what changes their local system makes to the records		X	X
Has a basic understanding of the classification scheme in use locally		X	X
Has a basic understanding of how their system indexes and displays MARC fields		X	X
Able to identify problems that should be reported to OCLC or other record provider		X	X
Has a basic understanding of subject analysis using appropriate thesauri		X	X
Has a basic understanding of authority control and how authority records impact the local catalog		X	X
Understands how cataloging fits in to and supports library services in general		X	X
Able to collaborate and communicate effectively, with a public service orientation		X	X
Has a thorough understanding of RDA and descriptive cataloging			X
Has a thorough understanding of MARC and how RDA principles translate into MARC			X
Maintains a current understanding of working with various types of econtent records			X
Has a thorough understanding of OCLC or other source of bibliographic records in use locally, and how to create an original record in all formats			X
Has a thorough understanding of classification using appropriate schemes; i.e. Dewey Decimal Classification, Library of Congress Classification			X

Has a thorough understanding of how their system indexes and displays MARC fields			X
Knows how to report problems to OCLC or other record provider			X
Has a thorough understanding of subject analysis using LCSH and any other appropriate thesauri			X
Has a thorough understanding of authority records and authority control			X
Has a basic understanding of other metadata structures (such as Dublin Core, BIBFRAME)			X
Has a basic understanding of methods and approaches for metadata creation, editing, and analysis			X
Has a basic understanding of exposing catalog data to the web (e.g. linked data)			X
Understands the management of cataloging functions, and application of consortial guidelines across the library			X
Able to work with contract cataloging providers			X

Other Training Recommendations

- Establish a mechanism for routinely soliciting continuing education topics from RAILS library cataloging staff
- Provide additional one-time or short series of continuing education events in other priority topics
  - Cataloging nontraditional materials (kits, devices, telescopes, etc.)
  - Trends or changes in cataloging (sourced from catalogers, popular topics on AutoCat listserv, etc.)
  - Longer, more in-depth sessions on topics in basic curriculum
    - Metadata creation and management
    - Dewey Decimal System and assigning Dewey numbers
    - Authority control
    - Why RDA?
    - Digital content records