

# The Roles of the Metadata Librarian in a Research Library

By John W. Chapman

*The position of metadata librarian recently has been a popular addition to the staff of research libraries. The position often is created in response to the opportunities and challenges of metadata management within libraries with significant digital initiatives. Treating specifically the institutions that place such a position within a traditional cataloging or technical services department, the author examines the distinctive combination of skills and responsibilities in these positions. He identifies four roles (collaboration, research, education, and development) that define the position and its mandate in the library, and also discusses the crucial factor of librarianship in pursuing these roles.*

Research libraries seeking to build or strengthen digital library programs have often created positions that focus on metadata management and creation. These positions can be found in a variety of administrative units. Libraries with a strong digital production or research focus may place a metadata specialist in the unit given responsibility for digital collection maintenance and development.<sup>1</sup> Other library operations may put metadata professionals in close alignment with particular initiatives, such as institutional repositories or special collections digitization. Metadata librarians also exist outside of traditional research libraries.<sup>2</sup> These positions are outside the scope of this discussion.

Many institutions have placed the position of a metadata librarian within a traditional cataloging or technical services department. Such a department has as its major focus acquiring, describing, and cataloging monographs and serials, working primarily within a paradigm of producing MARC records that are loaded and managed in an integrated library system (ILS). Johns Hopkins University, Pennsylvania State University, University of Minnesota, Yale University, University of Colorado at Boulder, University of Tennessee, and Cornell University have (at one time or another) placed a metadata librarian in this structure. This alignment, here termed the “technical services model,” will be the primary topic of this paper. The heterogeneity of other alignments makes additional generalizations difficult.

Within the technical services model, similarities emerge. While specific details vary, position descriptions show some points of commonality.<sup>3</sup> Beacom summarized the Yale approach to creating a metadata librarian position in a 2005 presentation, in which he laid out three areas of responsibility for the metadata librarian: standards development and documentation, metadata production, and collaboration on digital tools.<sup>4</sup>

Institutions that place metadata positions within technical services departments are seeking to leverage the metadata skills of their catalogers, expressed largely in MARC and displayed within MARC-centric workflows. Such departments are using the metadata librarian as a fulcrum. For example, the job description for the metadata librarian position at the University of Minnesota states that the metadata librarian will be involved in “facilitation of the integration of new types of data description into the traditional technical services workflow.”<sup>5</sup> The

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technical services model assumes that the library has assigned the primary responsibility for digitizing and serving library resources online (for example, providing access) to a digital library unit or information technology-aligned units. Thus, functionally, the metadata librarian is positioned between the unit (technical services) primarily charged with description and the unit charged with providing access and delivery.

In most digital collections projects, a third player is involved: the collection manager or curator. The specific expertise required for description of unique content may fall beyond the abilities of technical services professionals, requiring the collection manager (or his or her designees) with subject expertise to create plans for description. This situation may result in a large portion of the description occurring outside of the cataloging or technical service department. An example of such a system is the IMAGES system at the University of Minnesota. IMAGES (Image Metadata AGgregation for Enhanced Searching) provides a Web-based entry form for university units and departments to create metadata for images scanned by the libraries' Digital Collections Unit.<sup>6</sup> The number of players within even a simple project gives rise to many complex relationships between them.

The metadata librarian ends up playing a variety of roles in order to work effectively with the different participants in each project. This paper will address four key roles: collabo-

ration, research, education, and development. While none of these individual roles is unique to the metadata librarian compared to other librarian positions, the combination is unusual and especially distinctive within the technical services or cataloging environment. This is due partly, but not entirely, to the outward focus that is engendered by the collaborative and educational tasks. The roles incorporate both technical and political challenges, creating some unique pressures and tensions.

### Roles Defined

Others have sought to categorize the duties of a metadata librarian. Outside of job descriptions, one can find some hints. In Beacom's presentation, he categorizes typical actions as "Consult with others . . . Coordinate metadata production . . . Collaborate, communicate, & plan."<sup>7</sup> Four roles consistently appear in job descriptions for and articles about metadata librarians in the technical services model.

The author compared position descriptions posted in 2001 through 2006 by the seven institutions identified previously (see appendix). He identified common responsibilities or roles and categorized them as collaboration, research, education, and development (for example, exploration and advancement). The appendix sorts descriptive phrases from

the position postings under each of these roles. The roles and responsibilities are expanded in the next sections.

### **Role One: Collaboration**

Digital initiatives, as described above, are necessarily complex projects that require some cross-functional collaboration. (Collaboration is understood to mean a cooperative effort between parties who share a common goal.) In institutions following the technical services model, the complexity is especially apparent. The metadata librarian in this alignment is a champion for goals for which the responsible personnel may not all be located in a single department or division, or report to the same manager. The task of cross-departmental collaboration by technical services or cataloging staff is not in itself unusual. Selection and ordering tasks require relationships between subject specialists, collection management teams, and technical services staff. The processing and description of special collections materials creates complex partnerships, often across divisions, such as cataloging and archives and special collections units. The collaborative role of the metadata librarian is different in that it also is a consultative role, requiring flexibility and negotiation as all parties design solutions that are mutually acceptable.

External collaboration (outside an organization) is becoming more and more common, and the advantages to cross-institutional collaboration, and that between industries, has been recounted elsewhere.<sup>8</sup> Notable among these is the Google project to digitize the collections of several prominent libraries. Collaboration of this type is assisted by the effective communication of institutional standards and procedures, with an awareness of best practices. The metadata librarian is strategically placed to be a key resource in such discussions of collaborative digital projects.

The collaborative role is internal to technical services, as well as external. The metadata librarian must work with the technical services staff to develop procedures and documentation for metadata creation that support their work in as efficient a way as possible. Local practice, when it departs from national or international standards, or previous local practices, must be documented and shared. Service on internal library committees and project teams is a crucial part of collaboration. In addition to facilitating the creation of policies and guidelines that depend on broad agreement, participation brings the added benefit of creating a public face for the metadata librarian.

Collaboration on the national level is a key component of this role. Professional groups develop new standards, discuss new technologies for search and access, and share professional knowledge of approaches and solutions. A metadata librarian can contribute to local success by sharing internally the best practices and innovative approaches

discussed by these national groups. Professional groups in the metadata and data standards communities can create great opportunities for cooperation and collaboration across institutions. Two examples of groups pursuing sharing metadata include the libraries within the Committee on Institutional Cooperation, and the Digital Library Federation's Aquifer initiative.<sup>9</sup>

The last decade, and especially the last few years, has seen many spirited discussions of possible changes to long-standing traditions in the cataloging and description arena. In addition to announcements from the Library of Congress about changes in authority work, reports from institutions including (but not limited to) the University of California system have examined legacy cataloging practice and explored the possibility that it could be streamlined.<sup>10</sup> *Resource Description and Access (RDA)* will make significant changes to the *Anglo-American Cataloguing Rules*, 2nd ed. In the interests of following best practices and making cooperation with fellow institutions more efficient, many research libraries may wish to implement new workflows in their cataloging and technical services departments. Revising workflows and capacities can be politically and emotionally charged, even more so if positions are reassigned or eliminated as a result.

The metadata librarian, as one given the mandate to work with new initiatives and explore new possibilities, can be in a position to share these new ideas to the very people who will see changes to their employment situation. The metadata librarian has the opportunity to collaborate with technical services staff and their managers in providing a context for and facilitating such changes. As Higa and colleagues note, an institution-wide strategy must be implemented to avoid creating unnecessary tension in this area.<sup>11</sup>

### **Role Two: Research**

Acting as a researcher, the metadata librarian must maintain a knowledge and familiarity with the new developments in the field. Research is understood to mean systematic investigation and inquiry. The metadata librarian seeks to find information that will speed development of new initiatives within the library. This research often results in new tools for technical services and cataloging staffs.

The world of metadata and electronic resource access is a large one, in constant flux as standards are defined, edited, and created, and new ideas on searching and user interfaces are developed. As individual institutions grapple with existing standards and push up against the limits of these standards, libraries have the opportunity to inform, influence, or directly contribute to the metadata schema development. When libraries need to extend or refine these standards to fit their needs, they often will make this work publicly available in order to assist others. Although this sharing assists the community at large, it is less an act of

charity than a tool to help every institution, including one's own. A new language needs speakers to become meaningful, and the adoption of new standards helps build this meaning. Research helps build awareness of best practices and eases collaboration.

A universal problem exists with integrating a new mandate, such as metadata work, into a department focused on consistent and high output of catalog records. That problem is staffing—both in terms of available hours and available skills. As was mentioned earlier, in many cases creating descriptive records for digital resources requires more intensive description than is customary for catalog records. The level of expertise in a certain subject area may not be resident in a technical services or cataloging department. The time required to train staff to reach this level takes them away from their normal cataloging duties. The knowledge gained may not be applicable to other projects. The use of cataloging staff in this situation, building on and working with descriptive content contributed by others, may often require new software, schemas, or procedures. When libraries create metadata librarian positions, they generally charge these individuals with training other technical services staff in metadata applications, which in turn enhances the newly trained staff members' utility to digital initiative managers.

### **Role Three: Education**

Education, i.e., instruction, meshes tightly with the roles above, as it is crucial to ensure that the goals of creating efficient and effective metadata are present in all new library and information technology initiatives. The careful integration of new ideas and practices into those processes that have developed over time in cataloging and description workflows also is necessary.

As educator, the metadata librarian ensures that procedural and workflow changes are accommodated as easily as possible. Metadata librarian positions in the technical services model usually have education or instruction as a specific job duty. Position descriptions often include a technical services or cataloging audience, and a wider audience within the library and the university.<sup>12</sup>

The metadata librarian in a technical services model may encounter resistance to new standards and procedures on the part of staff in other library units or outside the library. For example, within a digitization project, the metadata librarian often must appeal to the collection manager to get the adherence to documented standards that is required. Staff outside of technical services may not understand the rationale for specified approaches and consistency in following them. However, education on the benefits of shared standards can be one important method by which the benefits of such cooperation and consistency are made clear.

The role as educator may expand beyond the library and institution in which the metadata librarian works. As he or she becomes known as knowledgeable and an advocate,

the metadata librarian may be asked to teach workshops and give presentations in the state and region, thereby expanding understanding and skills among staff in other libraries.

### **Role Four: Development**

Development, in this context, means the exploration of options and creation of new or revised approaches. The metadata librarian often must help develop methods to migrate, convert, and enhance metadata, making decisions on how best to balance new possibilities and existing realities. As a developer, the metadata librarian must be aware of the complexities and particulars of metadata schemas so that any needed migration or conversion can be as efficient as possible. The metadata librarian will need to read local documentation (or produce it, based on consulting with collection managers), while keeping in mind knowledge of common standards derived through research and past experience.

Many of the necessary tasks of metadata management and creation require documentation. The metadata librarian usually is expected to write technical documents to describe in a systematic fashion the structures, processes, and hierarchies of metadata schemes. This is one of the core functions described in nearly every metadata librarian job description. This documentation should be developed in the context of procedures and documentation with which the digital production staff are familiar and comfortable using.

Metadata is usually created with search access in mind. The metadata librarian, acting as developer, may be required to formulate ways to efficiently search through data in specific collections or to evaluate university-wide search tools. Taxonomies describing subject areas may be created for use both inside and outside the library's purview. The metadata librarian, especially if in a new position, may be asked to contribute to projects that draw together data created in disparate digitization projects. The metadata librarian has an important role in advancing and developing such projects and products.

### **Why a Professional Librarian?**

Many of the roles performed by a metadata librarian put the individual in close working contact with system administrators, interface designers, Web masters, and other technology-intensive positions, both inside the library and across the university—and beyond. To what degree, then, is the benefit to the library and the institution in having this individual positioned as a professional librarian, rather than as a technician, technical professional, or other non-librarian classification? This author suggests the answer is that the librarian brings a shared perspective, an outward orientation, and a focus on access, with an in-depth understanding of the tools and techniques necessary to its provision.

Some of the job duties common to metadata librarians in the technical services model are based on or have analogs

in more traditional library professional jobs. The expertise in various content standards mirrors those of catalogers and archivists, the knowledge of record formats is complementary to the deep MARC knowledge on cataloging staffs, and the reliance on controlled vocabularies draws comparison with the database gurus in technical services departments. Metadata work is not intrinsically new; what is new is its wide application outside the cataloging world. Simser supports this position when she writes, "The 'outside world' will eventually recognize catalogers' expertise at organizing information and will see how this skill is desirable in the digital age. Catalogers have increasingly become familiar with new technologies, and taking part in initiatives will highlight that knowledge."<sup>13</sup>

The technical services model benefits from the metadata librarian helping the department develop skills that will raise its profile in non-traditional cataloging projects. The metadata librarian can serve as the technical services department's formal voice in digital project planning. In order to do so effectively, the metadata librarian needs to have a basis of shared experience and expertise in cataloging concepts. The requirement of a master's degree in library and information science is a common way to ensure this shared perspective.

Another benefit of assigning metadata responsibility to a professional librarian is to confirm the importance of making all forms of information easily available. This model places responsibility for gauging the quickly evolving spectrum of digital possibilities in a profession that has, at its heart, access. To say that no one without a library degree can have this mindset is false. However, the metadata librarian in the technical services model brings shared professional library values and an outward focus to the roles of collaboration, research, education, and collaboration. Without these, metadata risks being unusable, useless, or unused. The professional metadata librarian is positioned to serve in guiding and facilitating effective, efficient, and complete description of collections.

## Conclusion

The position of metadata librarian, and the associated roles and responsibilities, is constantly evolving. This paper has sought to describe and analyze four roles that are presently seen in metadata librarians placed within technical services units. While specifically examined in relation to metadata librarian positions, these roles—collaboration, research, education, and development—also are descriptive of the responsibilities of professional, twenty-first-century librarians.

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## Appendix. Position Descriptions for Metadata Librarians in the Technical Services Model

Institution	Date	Roles			
		Collaboration	Research	Education	Development
Johns Hopkins University <sup>1</sup>	2001	Mention of collaborating with multiple units on-campus.	Qualifications require knowledge of existing standards and awareness of developments.	Outreach for, and soliciting feedback on, digital tools are specifically mentioned	Development of documentation, content standards, and schema definition are all mentioned.
Pennsylvania State University <sup>2</sup>	2006	“Collaborate with other librarians and library staff, Penn State Press staff, Penn State faculty, and colleagues in other research institutions to evaluate and apply appropriate metadata schemas for digital collections held by the Libraries and University.”	“Monitor and contribute to the development of national standards regarding the bibliographic control of digital resources. Explore new technologies and developments in digital applications and metadata implementation.”	“Train staff to provide metadata for digital resources and provide quality control for digital object metadata.”	“Provide leadership in the development of standards, policies and procedures across Technical Services, with particular responsibility for digital resources. As a member of the Digital Technology Advisory Group, manage and coordinate the process of implementing metadata, including needs assessment, metadata scheme adaptation, metadata interoperability, project management...”
University of Minnesota <sup>3</sup>	2004	“Collaborate with staff in Digital Collections, Special Collections/ Archives, the Digital Library Development Lab, and other Library and University of Minnesota units, on selected projects and Initiatives. . . . Collaborate with the Libraries Academic Programs departments in outreach to the campus in matters of access and description. . . .”	“. . . [shall] be involved in decision-making regarding appropriate metadata schemas for local use. . . . Actively maintain current knowledge of national metadata standards and schemas. . . .”	“. . . train library and other University staff in these standards and application of these concepts . . . hire, train and supervise part time staff for these projects . . .”	“[be involved in]development of reusable models for data access and tools to capture and repurpose data, and facilitation of the integration of new types of data description into the traditional technical services workflow.”
Yale University <sup>4</sup>	2004	“. . . works collaboratively with the Digital Resources Catalog Librarian, the Library Systems Office, Staff and colleagues throughout the Library system. . . .”	“Analyze the potential role of new standards in YUL Digital initiatives. . . . Continue to expand knowledge of theory and practice of metadata for digital resources. Monitor metadata and digital resource standards development and cataloging trends, and informs the Yale Library community about key developments.”	Education and training responsibilities not mentioned.	“Develop and implement new approaches for creating and manipulating bibliographic data for digital resources in ORBIS, the online Library catalog, and other platforms. Work with the Library Systems Office to develop scripts to automate metadata creation and conversion.”

Institution	Date	Collaboration	Research	Education	Development
University of Colorado at Boulder <sup>5</sup>	2006	“Assists the Head of Digital Resources Cataloging in the creation and continual evaluation of workflow for metadata provision, quality control, and training of other faculty and staff.”	“Maintains a working knowledge of established and emerging metadata schema, standards, best practices, vocabularies, markup languages, and protocols.”	“May teach metadata provision to members of the Cataloging & Metadata Services Department, Libraries faculty and staff, and members of academic departments as needed.”	“Participates in the Department Management Group, assisting in the creation and assessment of policies and procedures relating to cataloging, the Libraries’ catalog, and the metadata provision within the digital library. . . . Acts as a liaison with the Libraries’ Systems Department to implement technologies that advance cataloging and metadata provision.”
University of Tennessee <sup>6</sup>	2005	“The librarian works closely with the Digital Initiatives Coordinator and the Digital Library Programmer, who are based in the Library Technology Services, in the completion of chosen projects. . . . Work closely with content providers and Library Technology Services in the development of metadata.”	“Maintain knowledge of national and international descriptive, technical and administrative metadata standards and schema and be responsible for interpreting and adapting those metadata schema for local purposes. . . .”	“[has] responsibility for training staff members in the production of metadata. . . . Perform outreach to other areas of campus to increase understanding and use of digital objects in teaching, learning, and research.”	“Assist with grant submissions for additional projects and contributes to the development of a statewide digital library. . . . Assist the Team in maintaining the Team’s web site and helping with XSLT use in Aleph ILS implementation.”
Cornell University <sup>7</sup>	2003	“Works closely with staff throughout Technical Services and other divisions to provide access to the library’s collections.”	“[expected to] . . . track developments in metadata standards as well as recommend and design appropriate metadata schema (e.g., DC, MARC, TEI) to facilitate access to electronic resources and other collections.”	“Actively participates in public services and bibliographic instruction programs.”	“Actively participates in the library’s research and development efforts. . . .”

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