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Non-MARC metadata training for "traditional" catalogers: the role and importance of critical thinking pedagogy

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Non-MARC metadata training for "traditional" catalogers: the role and importance of critical thinking pedagogy

Abstract
Training "traditional" catalogers to create non-MARC metadata? My approach stresses critical thinking pedagogy -- metadata work is not about knowing a specific standard or tool, but about methodologies, thought processes, and an understanding of user goals and library data ecosystems. I hope to help you understand the role of critical thinking (or systems-level thinking) in training catalogers to leverage standards to independently develop high-quality, interoperable, user-focused metadata within continuously changing information ecosystems.

Keywords
metadata, non-MARC, catalogers, training, staff development, critical thinking, pedagogy

Disciplines
Cataloging and Metadata | Curriculum and Instruction | Educational Methods

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Non-MARC metadata training for “traditional” catalogers
the role and importance of critical thinking pedagogy

What is critical thinking?

- Transfer of training – skills are applicable outside of the training context (Halpern, 1984)
- More sustainable time investment in training rather than memorization of procedures
- Leads to reflective metadata practice which:
  - Questions information systems,
  - Adapts to a changing world, and
  - Yields metadata with high interoperability and value for users

Incorporating critical thinking into training activities

<table>
<thead>
<tr>
<th>Critical thinking skills and actions</th>
<th>Questions generated</th>
<th>Training activity</th>
<th>Skills to develop or pre-requisites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and re-state questions</td>
<td>Which is the problem I am trying to solve?</td>
<td>Write an email about a problem they have encountered</td>
<td>New/technical vocabulary</td>
</tr>
<tr>
<td>Look for info, weed info, synthesize</td>
<td>What information do I have and is it relevant?</td>
<td>Identify if a new type of resource can be integrated into your local system</td>
<td>Understanding of the limitations of local systems</td>
</tr>
<tr>
<td></td>
<td>Where can I find out how other libraries are dealing with the problem?</td>
<td>Have staff write a one-page proposal for solving a new problem, have them explain how they came to the conclusion they made</td>
<td>Understanding specifications of a new project</td>
</tr>
<tr>
<td></td>
<td>Who made this spreadsheet, and from what data source?</td>
<td>Conduct a feedback session where catalogers present and review each other's metadata work</td>
<td>Descriptive metadata creation</td>
</tr>
<tr>
<td></td>
<td>If the metadata set will not be created according to MARC, AACR2, and/or RDA standards, which rules will we follow?</td>
<td>Select an appropriate vocabulary or element set for a digital collection and create a data dictionary; Investigate the history and community of a metadata standard</td>
<td>Information about local systems and collection development policies related to metadata</td>
</tr>
<tr>
<td>Apply standards (Schaefer and Rubenstein, 2003)</td>
<td>Which controlled vocabulary would be the best fit for this collection?</td>
<td>Describe which is the type of material should be in/ on our library information systems</td>
<td>Information about local systems and collection development policies related to metadata</td>
</tr>
<tr>
<td>Avoiding “black and white” thinking (Shen, 2014)</td>
<td>Am I thinking of this problem as an “either/or” situation, when there might be other options?</td>
<td>Discuss where a new type of material should be in/ on our library information systems</td>
<td>Information about local systems and collection development policies related to metadata</td>
</tr>
<tr>
<td>Hunting assumptions (Brookfield, 2012)</td>
<td>Are my ideas based on observations or assumptions?</td>
<td>Use a finding aid with an archival description of a collection in creating descriptive metadata; compare their work to your initial impressions</td>
<td>Reading a finding aid and creating descriptive metadata</td>
</tr>
<tr>
<td>Explain how changes in a problem situation might affect the solution (Shen, 2014)</td>
<td>How will this data look once it’s loaded into our discovery layer?</td>
<td>Map the elements used in your metadata to another schema; Construct a “scope and purpose” section for a metadata application profile – who is the audience and what will they do with your metadata?</td>
<td>Metadata application profile authoring, metadata schemas, metadata mapping concepts</td>
</tr>
<tr>
<td>Summarize a pattern without making inappropriate inferences (Shen, 2014)</td>
<td>How can I confirm what I am observing here?</td>
<td>Assign subject headings to a group of images by consulting appropriate resources</td>
<td>Subject analysis and comfort with applying controlled vocabularies</td>
</tr>
<tr>
<td>Take informed action (Brookfield, 2012)</td>
<td>What is the best possible solution based on everything I’ve taken into account?</td>
<td>Author a metadata application profile for a local project</td>
<td>Knowledge of the components and use cases of metadata application profile</td>
</tr>
</tbody>
</table>

What are the benefits of critical thinking in metadata training?

- Transfer of training – skills are applicable outside of the training context (Halpern, 1984)
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Transferable skills + Critical thinking = Better training

As a metadata librarian, part of my job is to train catalogers in metadata creation. I originally approached this task from the standpoint of teaching individual tasks which contributed to a larger project. I did this through writing step-by-step procedures and holding training sessions on navigating digital collections software.

In evaluating the outcomes of my training sessions, I found that while staff could follow the exact procedures I had written, I was not helping them to develop a holistic understanding of metadata work. I decided that while the “click here, fill in this box, press ok” type of training was fine for a first project, it was not going to be sustainable for our department in the long run.

Catalogers have been trained to expect strict rules governing MARC metadata creation. In the world of non-MARC metadata, more reflective problem-solving skills are required to apply a myriad of standards to local practice. These skills can be taught.

I began reworking my training approach after participating in a 5-week “Critical Thinking in Your Classroom” teaching and learning circle on my campus. The pedagogical philosophy and techniques we discussed matched perfectly the kinds of learning I was hoping to see in my department. By applying these concepts, I began to craft a metadata training program which supports the development of critical thinking in metadata creation. I drew upon the metadata training I received as a graduate student from my supervisor and mentor, Shawn Averkamp, and the traditional cataloging training I received as a new professional from my supervisor and mentor, Lori Osmus Koppmeyer. I wanted to redesign the training I offer to help catalogers think strategically about the information ecosystem their work lives in. I also wanted to encourage them to think of their work from the lens of what would be most beneficial to the user, just as we do in MARC cataloging.

The chart on this poster includes a sampling of the skills, actions, and mindsets associated with critical thinking. In crafting this list, I focused on attributes critical to reflective metadata practice. I then developed corresponding question prompts and active learning activities. I’ve used these to incorporate both transfer of technical skills and something broader, which I hope leads to a more holistic and reflective practice of metadata creation.