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### Abstract

This paper explores training in metadata creation for digital collections among cultural heritage communities in the context of a challenging economic and professional development climate. It is the author's experience that many cultural heritage professionals from smaller institutions have not had the resources to obtain training in the standards and best practices necessary for building and maintaining digital collections that are robust and interoperable outside of their local context. This paper draws on theory and personal experience to propose that larger institutions should assist their smaller counterparts through localized peer training programs, and that the benefits drawn from these programs may position cultural heritage institutions to better innovate and adapt to the ever-changing information landscape.

### Keywords

Peer training, Metadata, Museums, Libraries and Archives

# Making Lemonade: The Potential of Increased Peer Metadata Training among Cultural Heritage Professionals

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## Abstract

This paper explores training in metadata creation for digital collections among cultural heritage communities in the context of a challenging economic and professional development climate. It is the author's experience that many cultural heritage professionals from smaller institutions have not had the resources to obtain training in the standards and best practices necessary for building and maintaining digital collections that are robust and interoperable outside of their local context. This paper draws on theory and personal experience to propose that larger institutions should assist their smaller counterparts through localized peer training programs, and that the benefits drawn from these programs may position cultural heritage institutions to better innovate and adapt to the ever-changing information landscape.

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## Introduction

In 2009, I was approached by colleagues at the University of New Mexico (NMU)<sup>1</sup> about creating a small, informal, and most importantly, very low-cost metadata training day for members of cultural heritage institutions<sup>2</sup> in New Mexico. The idea was inspired by a two-day training course for members of the UNM's digital collection in celebration of the upcoming State centennial. UNM covered the cost of a trainer from the Bibliographic Center for Research (BCR), and asked only that the attendees cover their travel expenses.

There is a growing interest in digitizing collections in New Mexico's cultural heritage community and, consequently, in metadata. Unfortunately, there are very few institutions that can provide travel budgets for conference attendance, and the opportunity to bring professional training to the area is rare. My colleagues and I were fortunate to have formal training and be able to regularly attend conferences. What we learned allowed us to develop localized peer training and share our good fortune with colleagues from institutions with fewer resources.

New Mexico Metadata Day, as we called our training, was composed of three presentations. The presentation covered general information

on metadata in a number of contexts, including specific information on the Dublin Core Metadata Scheme and the Open Access Initiative Protocol for Metadata Harvesting (OAI-PMH). The initial training sessions were held in Albuquerque and Las Cruces, New Mexico, and attracted cultural heritage professionals from around the State and West Texas.

New Mexico Metadata Day was a success and to date the material has been offered five times, once being specifically requested by the University of New Mexico's Information Technologies Department.<sup>3</sup> Attendees from all sessions expressed their appreciation for giving them an opportunity for metadata training that they may not have had otherwise. This appreciation, along with the fact of the presentation actually being requested by an IT department, made me realize that this kind of peer training could play a larger role in helping institutions of all shapes and sizes prepare for, launch, and support robust digital collections.

## Why We Need Additional Training in Metadata

Professional development opportunities are an important component in keeping professionals up-to-date in any field. One important reason that institutions building digital collections need



additional training is to facilitate the quality and interoperability of the collections. It is no longer news that data from cultural heritage collections are being accessed and used in ways cultural heritage professionals may never have dreamt of, and that standards and practices have developed to facilitate this access and use. The descriptive data of digital objects are “the hidden glue that holds a digitization project together and makes it available to users,”<sup>4</sup> so it is vital that descriptions are created according to developed standards that allow resource sharing and access among other cultural heritage institutions and to the users of the collections. However, in networking with other cultural heritage professionals from around the country, I can say that awareness and training in these standards are still slow to trickle down to smaller institutions. The importance of the quality and interoperability of digital collections are not limited to academic libraries alone, hence reasons for both New Mexico Metadata Day and for this paper in addressing the larger sphere of cultural heritage institutions. I have met many cultural heritage professionals from small, stand-alone archives and museums who are as interested as their library peers in making their collections available digitally. While we may come from slightly different points of view, our missions are similar to one another. Also, data from our digital collections will inevitably mingle in cyberspace. Because, it is noted, “data exchange and reuse are hindered by inconsistencies in the data,”<sup>5</sup> it is important for us to make sure that everyone in the cultural heritage community is committed to successful data creation.

Wisser<sup>6</sup> and Hider<sup>7</sup> found that metadata training was in high demand for continuing professional development. While much can and has changed in six years, the demand for metadata training is still high, especially given the growing importance of digital collections and changes in other areas of library operations. In a 2010 survey of metadata practices in academic and non-academic libraries, Lopatin found that while libraries have metadata specialists assigning metadata to digital objects a majority of the time, a substantial portion of the work of assigning metadata is done by a diverse population within libraries, including catalog librarians, paraprofessionals, special collections librarians

and archivists, and, in some cases, systems librarians, subject specialists, temporary staff, students, and volunteers.<sup>8</sup> It seems unlikely that institutions would be able to provide formalized metadata training for all of these various parties, and for those non-metadata specialists who have dedicated professional development funds, it seems likely that those funds would go to their primary job functions first.

The results of Lopatin’s study imply that there is already peer training happening internally in libraries that a larger, more formal inter-institutional peer training program may be able to supplement or improve. Lopatin’s study also indicates that there are still libraries creating metadata largely according to local practice that not yet factor interoperability into their metadata production. Of the institutions that responded to Lopatin’s survey, 83% of academic libraries and 66% of non-academic libraries were building their digital collections and creating their metadata with interoperability in mind. These are encouraging numbers, but the numbers of institutions not planning for interoperability are still substantial, and the practices of institutions that did *not* respond to the survey must also be considered.

The articles cited above refer specifically to libraries, but if we extrapolate the same kinds of issues to stand-alone archives and museums, the potential of localized peer training to fill the need for metadata training increases exponentially.

### Why Localized Peer Training?

Peer training already accounts for many, if not most, of the professional development opportunities that exist within librarianship. The workshops and presentations found at professional conferences are generally conducted by librarians active in the field and many remote learning opportunities are presented by active librarians, sponsored by non-profit library organizations. However, our limited resources are at the mercy of an economy in the United States that went bad, got worse, and then got ridiculous. At the same time, as Lubas, Schneider and Jackson suggest, “the rapid proliferation of resources and vastly changed user expectations resulting from technological improvements have added to



what cultural heritage professionals must achieve within their limited resources, and changed the speed at which they are expected to make resources available.”<sup>9</sup> We find ourselves in a situation where lifelong learning is imperative in order to keep pace with an ever expanding amount of information.<sup>10</sup> Concomitantly, continuing education opportunities, whether in-person or remote, are becoming ever more expensive and fewer and fewer of us have the resources to pursue the necessary knowledge.

Brown and Hammond defined peer training as “education for a specific group that is led by members of that group,” and asserted that peer training “offers unique benefits that professional training does not...[because] there can be a strong identification between leader and group member and better leader understanding of group member perspective.”<sup>11</sup> Other studies support the idea that peer training offers benefits over professional training in that trainers “with intermediate levels of expertise may be better suited to sharing expertise with novice because they are closer to the novices’ own experience.”<sup>12</sup>

Having trainers from the same peer group and who are closer to the learner’s level of experience can make a better training experience for both the trainer and for the learner. Manaka and Hughes assert that “learning is most effective when it takes place as a social activity.”<sup>13</sup> Because the trainer can be perceived as a member of the same group as the learner, the learner may also see the peer trainer as less threatening and more approachable than a professional trainer.<sup>14</sup> Reducing the fear of being seen as ignorant by a highly-experienced professional trainer can put the learner at ease, and make for a more informal and engaging training event. In turn, learners may interact with trainers more openly and in ways that help in evaluating and improving the presentations.

Senge found that “adults learn best when they are working on current, real-life challenges and exchanging feedback with others in similar situations.”<sup>15</sup> Localized peer training may be more effective in that the information covered can be more readily linked contextually to collection areas and concerns common to both learners

and trainers. To a certain extent, the learner’s day-to-day work can be incorporated into the course outline<sup>16</sup> that will allow the learners to link the skills being taught to actual on-the-job situations.<sup>17</sup>

If these situations, likely trainers and learners are already socially familiar with each other. Many of the learners at New Mexico Metadata Day knew the trainers and knew each other and had already developed strong professional friendships. This factor may contribute significantly to the comfort level of both trainers and learners and enhance the benefits of peer training stated above.

### **Creating and Evaluating Localized Peer Training**

Localized peer training can be created in a way that is easier to organize and be far less expensive than other forms of continuing professional development. Given that, peer training could become a regular activity for certain groups. The benefits, of course, would include timely knowledge about the rapid changes in the cultural heritage community without waiting and budgeting for professional travel and training. New Mexico Metadata Day was created in response to a specific need in the community and was small enough to be coordinated in ways that provided a great deal of convenience for everyone involved.

Our first step was to determine what information our colleagues would need to gain a basic understanding of metadata practices and to determine what knowledge each of us had that would help meet that need. Having multiple trainers allowed us to split the necessary content into smaller sections. This increased the focus that we could give our individual presentations and kept us from feeling overwhelmed by the amount and variety of material that needed to be covered.

Because we were planning the sessions with the aim of trying to provide training to those with fewer resources, we tried to keep things as cost effective and convenient for participants as possible. We planned two sessions based on the geography of the State. The first session was held

in Albuquerque, New Mexico, a location fairly accessible to the populations of the northern and central portions of the State. We began the training at 10 a.m. with the hope that participants from the surrounding area would be able to drive to the event from their homes, thus avoiding hotel costs. We also planned training during the University of New Mexico's Spring Break so that participants would have an easier time finding parking on campus. Finally, there was no charge for the training.

The second session was held in Las Cruces, New Mexico, a location chosen for its proximity to populations in the extreme southern portion of the State. It is also close to El Paso, Texas, and the Las Cruces session had participants from West Texas. Again, it began at 10 a.m. and was planned during New Mexico State University's Spring Break.

The sessions also proved to be cost-effective for the hosting universities. Each library had meeting rooms that were available at no cost. Each library provided refreshments for the participants. Holding the meeting at the local university provided exposure for the hosting library, and for minimal cost. Overall, these events were substantially less expensive than what libraries individually or the community as a whole faced in bringing in a professional trainer or if they had to send employees to a professional conference.

Evaluating a localized peer training session can also be a fairly simple task. A feedback survey was emailed to participants from both sessions shortly after the events. This survey contained both open-ended and closed questions regarding the metadata knowledge participants brought to the session, how they thought the training would benefit them in the future, and what knowledge they gained from the session.

There was a 26% response rate for the survey, and while that may be low for formal presentation or publication purposes, it was invaluable to us. Responses allowed us to speculate on the amount of metadata knowledge that had existed in the state, whether institutions were considering digital collections in their near or distant futures, and how cultural heritage professionals

#### New Mexico Metadata Day Feedback Survey Questions

- Why were you interested in attending Metadata Day?
- Do you agree with the following statement: The knowledge you gained at Metadata Day will be useful in your present or future job duties.
- Did your employer share your interest in attending Metadata Day?
- What was your experience with metadata prior to the training session?
- Have you previously created metadata in a schema other than MARC/AACR2? If so, which schema have you used?
- What did you hope to gain from attending Metadata Day?
- What did you find to be the most interesting or helpful part of the workshop?
- What did you find to be the least interesting or helpful part of the workshop?
- How do you feel the workshop can be improved?
- Do you feel that you know more about metadata in cultural heritage institutions now?
- Do you have any suggestions for future metadata training workshops?

Figure 1. New Mexico Metadata Day Feedback Survey Questions<sup>18</sup>

viewed the importance of metadata in digital collections.

Most importantly, however, it provided us with insight into how we could fine-tune the various aspects of our sessions in the future, including ways to provide a better explanation of what the session would entail, the skill level for which it was intended and ways that we could make the session more relevant and engaging. The material has been presented three times since the initial Albuquerque and Las Cruces offerings. The survey and other types of participant feedback

has allowed, and while the survey was not conducted for these subsequent offerings, what we learned has allowed to view the events from a user perspective and to better judge the success of the sessions and to fine-tune.

### **Successful Peer Training Programs in Cultural Heritage Literature**

Accounts of other successful peer training programs in cultural heritage institutions appear to be few and far between, but they do exist. The North Carolina Exploring Cultural Heritage Online (NC ECHO) project is an excellent example of cultural heritage institutions in a geographical area working together to create standardization among their digital collections, and how using peer training helps ensure that standardization.<sup>19</sup> NC ECHO began with a comprehensive survey of the cultural heritage collections in the State, the results of which were used in the development of a program that included “education and outreach opportunities [and] the development and maintenance of standards and guidelines for digitization.”<sup>20</sup>

Another example comes from Canada, from what one may call the “other side of the digital collection universe,” in that the data in question is governmental data rather than cultural heritage descriptive data. Technological advances in the early 1990s changed the way the Canadian government looked at government publishing. This gave rise to the Data Liberation Initiative (DLI) in 1996. Members of the DLI traveled throughout Canada using peer training programs to train the academic librarians who would be implementing and supporting the initiative on a local level. As there were few experienced data librarians in Canada at the time, DLI trainers found themselves training librarians not only to work with the new system but also to become trainers in the system themselves. Once librarians had received training from the DLI core trainers, they were able to conduct similar sessions on a more regional basis. In this way, training was spread throughout Canada and a community of skilled data specialists was ultimately created.<sup>21</sup>

An example of peer training from beyond the field of digital librarianship comes from the

“COIL on Wheels” program. COIL, the “Community of Oklahoma Instruction Librarians,” is a special interest group of the Oklahoma chapter of Association of College and Research Libraries. In 2007, COIL librarians responded reduced budgets for professional development opportunities by building a program where librarians from around the State could request presentations or workshops on certain topics. Willing librarians in COIL with the necessary knowledge would create and present sessions on topics requested by other library groups in the region.<sup>22</sup>

Research shows that there are many other examples of peer training in other types of institutions and industries but those cited here are particularly illustrative of training issues relevant to cultural heritage institutions. These cases are notably successful and sustained programs and are especially compelling for their cost-effectiveness. These examples show that with a “teachable spirit, [and] a genuine interest in helping people succeed”<sup>23</sup> we can fulfill needs in our community and in build meaningful, long-lasting programs.

### **Conclusion**

Clearly, the benefits<sup>24</sup> to metadata peer training are significant: cost effectiveness, simple to develop, locally relevant, expanded knowledge base and skill level, increase access and interoperability of cultural heritage collections, professional experience for trainers. The approach to professional development represents a dramatic case of making lemonade when a poor economy delivers lemons. By expanding peer training in digital and metadata librarianship and to archives and museums in the areas where our missions and goals overlap, we may be able fill in the gaps in professional development. We may be able, as a whole field, to innovate at a pace closer to that of the rest of the digital world, and to stake a better claim in the new information society. Using localized peer training at these grassroots levels to create connections, to inspire collaboration, and to ensure that knowledge and training are spread to all at a quicker pace is key in realizing new potentials.

## Endnotes

<sup>1</sup> Rebecca Lubas is the Director of Cataloging and Discovery Services and Amy Jackson the Digital Initiatives Librarian at the University of New Mexico University Libraries.

<sup>2</sup> In this article, the term 'Cultural heritage' refers to libraries, archives, and museums.

<sup>3</sup> For more information about New Mexico Metadata Days see: Rebecca Lubas, Ingrid Schneider, and Amy S. Jackson, "Metadata Training in New Mexico: A Case Study" (paper presented at the 2011 Transborder Library Forum/Foro Transfronterizo de Bibliotecas, Austin, Texas, July 21-23, 2011. Available at: <http://repositories.lib.utexas.edu/handle/2152/13297> .

<sup>4</sup> Sue Kreigsman, "Catalog Training for People Who Are Not Catalogers: The Colorado Digitization Experience," *Cataloging & Classification Quarterly* 34: 3 (2002): 369.

<sup>5</sup> Library of Congress Working Group on the Future of Bibliographic Control, "On the Record: Report of the Library of Congress Working Group on the Future of Bibliographic Control" January 9, 2008. Available at: <http://www.loc.gov/bibliographic-future/news/lcwg-ontherecord-jan08-final.pdf> .

<sup>6</sup> Katherine Wisser, "Meeting Metadata Challenges in the Consortial Environment: Metadata Coordination for North Carolina Exploring Cultural Heritage Online," *Library Hi Tech* 23: 2 (2005).

<sup>7</sup> Philip Hider, "A survey of continuing professional development activities and attitudes amongst catalogers," *Cataloging & Classification Quarterly* 42: 2 (2006).

<sup>8</sup> Laurie Lopatin, "Metadata practices in academic and non-academic libraries for digital projects: A survey," *Cataloging & Classification Quarterly* 48: 8 (2010): 731-2.

<sup>9</sup> Lubas, Schneider, and Jackson, "Metadata training," 5.

<sup>10</sup> Chris Evin Long and Rachel Applegate, "Bridging the gap in digital library continuing education: How librarians who were not 'born digital' are keeping up," *Library Administration & Management* 22: 4 (2008): 172.

<sup>11</sup> Stephanie Willen Brown and Chelsea C. Hammond, "UConn's experiment with student 'ambassadors' for vendor-funded training on specialized searching," *Library Journal*, September 15, 2008. Available at: <http://www.libraryjournal.com/article/CA6592645.html> .

<sup>12</sup> Pamela J. Hinds and Jeffrey Pfeffer, "Why organizations don't 'know what they know': Cognitive and motivational factors affecting the transfer of expertise," in *Sharing expertise: Beyond knowledge management*, edited by Mark Ackerman, Volkmar Pipek, and Volker Wulf (Cambridge, MA: MIT Press, 2003), 17.

<sup>13</sup> Pauline D. Manaka and Carol Anne Hughes, Ph.D., "Grass Roots Peer Training: An Evidence-Based Experience" (paper presented at the World Library and Information Congress: 73<sup>rd</sup> IFLA General Conference and Council, Durban, South Africa, August 19-23, 2007).

<sup>14</sup> Daniel Rickett, "Peer Training: Not Just a Low-Budget Answer," *Training* 30: 2 (1993).

<sup>15</sup> Peter M. Senge, "The Fifth Discipline: The Art and Practice of the Learning Organization (New York: Doubleday, 1990), quoted in Michele N. Costanza et al., "Peer Training Facilitator's Guide (Fort Knox, KY: United States Army Research Institute for the Behavioral and Social Sciences, 2009), 1.

<sup>16</sup> Rickett, "Peer Training."

<sup>17</sup> Manaka and Hughes, "Grass Roots Peer Training."

<sup>18</sup> Lubas, Schneider, and Jackson, "Metadata training," 11

<sup>19</sup> Wisser, "Meeting Metadata Challenges."

<sup>20</sup> "About NC ECHO," State Library of North Carolina, accessed February 21, 2012. <http://www.ncecho.org/about/index.shtml> .





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<sup>21</sup> Ernie S. Boyko et al., *Lifting Ourselves by our Bootstraps: Developing a National Peer Training Program for Data Librarians in Canada* (paper presented at the World Library and Information Congress: 69<sup>th</sup> IFLA General Conference and Council, Berlin, Germany, August 1-9, 2003).

<sup>22</sup> Toni Hoberecht, "COIL on Wheels: A Library Professional Development Roadshow," *Medical Reference Services Quarterly* 29: 3 (2010).

<sup>23</sup> Rickett, "Peer Training."

<sup>24</sup> Other benefits, beyond the precise scope of this study, by also relevant, include the development of social capital, the expansion of intellectual capital, and expansion of services. For further resources, see: Janine Nahapiet and Sumantra Ghoshal, "Social Capital, Intellectual Capital, and the Organizational Advantage," *The Academy of Management Review* 23: 2 (1998): 243; Mohan Subramaniam and Mark A. Youndt, "The Influence of Intellectual Capital on the Types of Innovative Capabilities," *Academy of Management Journal* 48: 3 (2005); Daniel Greenstein and Suzanne E. Thorin, "The Digital Library: A Biography," (Washington, D.C.: Digital Library Federation, 2002); From the Digital Library Federation website, "The Digital Library Federation (DLF) is a network of libraries and related agencies that are pioneering the use of information technologies to extend collections and services." "About the Digital Library Federation," Digital Library Federation, accessed February 27, 2012. <http://www.diglib.org/about/>; Janet Swan Hill, "Cataloging Boot Camp: The Training Issue for Catalogers" (paper presented at the ACRL Twelfth National Conference, Minneapolis, Minnesota, April 7-10, 2005): 101; Library of Congress Working Group, "On the Record," 4.