

RBMS competencies for special collections professionals

Approved by the ACRL Board of Directors, July 2008

by the ACRL Rare Books and Manuscripts Section Task Force on Core Competencies for Special Collections Professionals

I. Introduction

A. Background

Over the past decade, a number of factors have focused attention on special collections and the professional skills, academic credentials, and personal qualities needed for a successful career in special collections librarianship. In 2001, the Association of Research Libraries (ARL) established a Task force on Special Collections to further an agenda to maximize the full potential of special collections. Its charge included, "Define core competencies among special collection librarians and create training opportunities."¹ In 2003, the ARL Board of Directors endorsed the statement "Research Libraries and the Commitment to Special Collections," which described special collections as "one of the critical identifiers of a research library" and affirmed the "critical role" played by special collections in fulfilling the mission of research libraries.²

At that time, ARL directors also perceived a significant shortage of candidates ready to take on the responsibilities of administrative positions to be filled in the coming decade. The ARL Task force consequently identified recruitment, training, and continuing education as high priorities on its agenda. A white paper prepared by the Task force, entitled "Education and Training for Careers in Special Collections," surveyed recent changes in professional education for special collections professionals and identified a number of new

programs and initiatives emerging to meet recruitment and training needs. The white paper reiterated the importance of articulating competencies required by special collections librarians and acknowledged that education and training opportunities are needed at all career levels.³

These developments reflect profound changes in the roles, responsibilities, and expectations of special collections librarians. The changes parallel those in research librarianship generally and are chiefly the result of evolving information technologies. But they affect special collections most especially because special collections professionals work in increasingly diverse environments and carry an unusual variety of responsibilities. Individual career paths differ greatly. There is an expanding range of formats in collections, including three-dimensional artifacts and audio, visual, and digital materials. The audiences for our collections and services have grown to include students at all levels and members of the general public of all ages and backgrounds, both onsite and online. Although special collections have always encompassed both technical and public services work and professional assignments are often of broad scope, the digital environment integrates these areas more fully: instruction and outreach efforts require technical skills, and metadata librarians must have a keen understanding of users' needs and preferences. Special collections librarians cannot

succeed without effective collaboration with faculty and library colleagues. At the same time, expertise is now required in areas such as rights management and fundraising.

In response to these factors, the Rare Books and Manuscripts Section (RBMS) of ACRL/ALA appointed a task force in 2005 to study the question of core competencies for special collections librarians and to prepare a set of recommendations for possible adoption by ACRL. The task force decided that its statement would be concerned with all types of special collections environments, be intended for a very broad audience, encompass all formats of materials, address special collections professionals, and speak to the future of the profession (2010-2020). Because the profession will continue to evolve, the task force views this document as a guide to career-long learning and acknowledges the need for its ongoing review.

B. Methodology

The task force conducted a literature search and prepared a bibliography of relevant core competency statements, guidelines for professional graduate programs, and published articles. It listed the competencies enumerated in these documents and reviewed position titles and job responsibilities for special collections postings as they appeared during 2005 on the electronic discussion list Exlibris and in *The Chronicle of Higher Education*. Through crossover membership, the task force kept up to date on the activities of the Society of American Archivists' Committee on Education.

In the fall of 2005, the task force distributed a questionnaire to RBMS members seeking input. The questionnaire defined a core competency as "knowledge, ability, or expertise in a specific subject area, or a skill set that serves as the basis from which additional competencies for particular jobs are developed." Responses from that questionnaire informed the drafting of this document. In 2006 the RBMS Bibliographic Standards Committee prepared and submitted to the task force its recommendations for core

competencies for special collections catalogs. That year an open discussion group was held during the RBMS Preconference in Austin, Texas, focusing on the first draft of this document and on programs in graduate schools relating to core competencies. Open discussions have been held at task force meetings during ALA Midwinter Meetings and ALA Annual Conferences. In addition, input has been solicited from the ARL task force, other interested groups, and from attendees at an open hearing held at the ALA Annual Conference in 2007.

C. Relationship to Other Competency Statements

Special collections professionals need many of the same skills required of all research librarians in the 21st century.⁴ The statement issued by the Association of Southeastern Research Libraries (ASERL), "Shaping the Future: ASERL's Competencies for Research Librarians," describes the competencies needed by all research librarians in order to exploit fully the opportunities created by technological advances and to meet teaching and research missions now and into the future. The statement notes that "attributes of the successful research librarian include intellectual curiosity, flexibility, adaptability, persistence, and the ability to be enterprising. Research librarians possess excellent communication skills. They are committed to lifelong learning and personal career development."⁵ Since the competencies enumerated in the ASERL document apply to all research librarians, the RBMS task force concluded that there is no need for duplication. The present RBMS statement focuses on elaborating these competencies as they are required in special collections environments.

D. Purpose

This statement is intended to define our profession and to foster a sense of community and common identity among special collections professionals, while helping others to understand our work. We hope that the statement will prove helpful to those planning

a career in special collections, archives, and libraries, current members of the profession, educators developing library and information studies (LIS) curricula, and administrators writing or reviewing position descriptions and making hiring decisions.

The definition of a “professional” is in part institution-specific, and can encompass a variety of position titles such as librarian, archivist, and curator. While this document does not assume that an LIS degree is required for appointment at the professional level, it recognizes the important role played by library schools in creating a set of shared values that link special collections staff to each other and to their library colleagues. And, while an advanced subject degree is not a requirement for entry into the profession, it appears in an increasing number of position descriptions and is appropriate as a requirement for many specialized positions.

II. Fundamental competencies

As described in Section I, today’s special collections environments are increasingly diverse. They vary significantly with regard to institutional setting, nature of collections, scope of functions and services, and audience. A special collections professional may experience much of this variety over the course of his or her career, taking on different public and technical service duties, curatorial functions, and management responsibilities. Even those who remain focused on a single functional specialty within one institution will best contribute to that institution’s vitality and success by developing broad awareness of the full array of responsibilities that define the field as a whole. This document assumes a professional who gradually achieves such general proficiency over the course of his or her career; full mastery in all areas, however, is by no means expected.

The following key areas of knowledge and practice are essential elements for the work of special collections professionals. It is understood that these fundamental competencies provide firm support for the specialized competencies described in Section III.

A. Understands the basic history, theory, and professional practices relating to materials generally found in special collections research libraries, including but not limited to rare books, maps, prints, photographs, ephemera, archives, manuscripts, original artwork, audio-visual media, and digital materials

B. Understands the significance of original artifacts and the nature and value of primary materials for learning, teaching, research, and outreach

C. Develops and maintains knowledge of liberal arts, history, and culture as these contribute to the understanding, development, and promotion of special collections

D. Develops and maintains foreign language competencies appropriate to the repository’s collections and the needs of researchers

E. Is familiar with and committed to the standards, ethics, guidelines, trends, and best practices in use by special collections professionals and promulgated by core professional groups such as ACRL’s Rare Books and Manuscripts Section, the Society of American Archivists, and the American Association of Museums

F. Is committed to the profession and professional organizations, including providing leadership within the broader professional community

G. Is committed to lifelong learning as applied to professional development in a special collections environment

H. Understands the basic theory and practice of collection development as these concepts apply to building and shaping collections, to identifying sources for particular materials, to donor relations, and to managing funds

I. Develops and maintains knowledge of technologies that are key to management and dissemination of special collections materials

J. Develops and maintains knowledge of intellectual property rights, copyright, rights management, patron and donor privacy, and other legal issues, especially as they apply to primary materials in various formats

K. Understands the security and preservation needs of the collections, both in storage and during use

L. Understands the purpose, construction, and presentation of formal descriptions of special collections materials, such as bibliographies, bibliographic utilities, catalogs, and finding aids

M. Is committed to promoting the appreciation and use of special collections materials to a variety of audiences and is able to engage those audiences with the excitement that original materials can inspire

N. Is committed to integrating special collections into the broader institutional environment and is able to collaborate successfully within the larger organization and community

O. Is committed to the central importance of service to the researcher

P. Develops and maintains knowledge of the content and organization of the collections in the repository, including their bibliographic, historical, cultural, and institutional aspects

III. Specialized competencies

Taking the preceding fundamental areas of knowledge and practice as a foundation, the following specialized competencies cluster and build upon particular areas of practice. The introduction for each section describes the context for that area of practice in special collections environments, and the corresponding competencies outline related functions. Many special collections professionals have multiple responsibilities that require proficiency in several areas of practice, while others specialize in a single, focused area. The level of proficiency required will vary according to the particular position, the institutional setting, and the career path of the professional.

A. Collection Development

Special collections professionals build and administer specialized collections in accordance with the history, mission, and policies of their parent institutions. By deciding what

or what not to collect, librarians and archivists participate in the preservation of intellectual and cultural history. Such responsibilities require an understanding of the principles and methodologies of collection development, of provenance, and of collecting in all formats as appropriate for specific collections.

Competencies

A.1. Understands the theory and practice of collection development, including establishing goals and priorities, researching and documenting provenance, conducting assessments of collections, and appreciating the relationships between the physical items, their content, and monetary and research values

A.2. Understands acquisition methodologies and fund management as applied to the development of specific collections

A.3. Is skilled in donor relations, including identifying and cultivating prospective donors; negotiating gifts; preparing deeds of gift and deposit agreements; maintaining current knowledge of sources for appraisals, relevant tax regulations, and professional legal resources; and creating strategies for long-term donor stewardship

A.4. Develops and maintains a knowledge of the rare book, manuscript, and ephemera marketplace, private presses, and nontraditional or unusual sources for acquiring materials

A.5. Is able to establish effective relationships with vendors, organizations, communities, individuals, and colleagues for the purpose of developing collections

A.6. Understands the concepts of rarity, scarcity, age, physical and intrinsic characteristics, condition, market value, historical and cultural significance, and teaching and research value so as to identify materials appropriate for a special collection

B. Information Technology

Special collections professionals use the tools of information technology to manage collections and provide enhanced access to primary resource materials. As part of their

mission to make their collections available to research communities and the general public, they explore, evaluate, and adopt appropriate technologies to achieve their goals. Working with rapidly changing information technologies requires them to be flexible, committed to continual learning, and able to collaborate with librarians and staff in other areas of the library and parent institution. Special collections professionals develop standards and best practices for the application of information technologies to functions relevant to their profession.

Competencies

B.1. Maintains awareness of issues, standards, trends, and current best practices regarding the full range of information technologies

B.2. Understands the use of methodologies, including digital imaging and recording technologies, for creating reproductions of primary source materials

B.3. Is familiar with the use of digital asset management systems and metadata for providing access to digitized primary source materials

B.4. Is familiar with schemas used for encoding digital collection resources and descriptions

B.5. Is familiar with the creation and maintenance of Web sites

B.6. Is familiar with publishing trends related to digital resources

B.7. Maintains awareness of changes in the scholarly uses of information technology and user expectations

C. Management, Supervision, and Administration

Special collections professionals provide management, supervision, and administration in widely varying roles and settings. Skills in managing people, resources, material, and projects are required of most special collections professionals. The ability to provide leadership, facilitate change, and develop collaboration is implicit in all these management competencies.

Competencies

C.1. Possesses the ability to provide leadership within the larger organization to ensure that the special collections unit is well understood and valued

C.2. Understands effective fiscal management, including planning and controlling budgets, managing existing financial resources, and creating and maximizing sources of funding

C.3. Is able to recognize individual characteristics, needs, and potential in hiring, training, supervising, and evaluating special collections personnel

C.4. Understands the value of continued educational development and specialized training for staff relevant to their work in special collections

C.5. Understands the value of a diverse workforce and promotes those goals and applications within the special collections environment

C.6. Is proficient in short-term and long-term planning, policy development, and assessment

C.7. Is proficient in project management in order to initiate, facilitate, conclude, and evaluate projects with efficiency and effectiveness

C.8. Develops and maintains knowledge of physical environments and facilities optimal for long-term preservation, security, and use of special collections materials

C.9. Understands the grant writing process and grant administration

C.10. Is knowledgeable of the appraisal, valuation, and insurance processes for collections of primary source material

D. Preservation and Conservation

Special collections professionals understand the basic principles, objectives, and techniques for the preservation and conservation of original objects in various formats, including printed works; manuscripts; photographs, prints, and other graphical works; audio-visual and digital media; and three-dimensional objects.

Competencies

D.1. Is familiar with library, archival, and museum preservation and conservation issues, standards, trends, and best practices

D.2. Understands and advocates for proper handling of primary resource materials

D.3. Understands the role of preservation assessment within a collection management and development program

D.4. Possesses sufficient knowledge to identify the preservation and conservation needs of collection materials and establish treatment priorities

D.5. Understands environmental conditions required for the proper storage of various types of collection materials

D.6. Is knowledgeable of resources for specialized expertise and is able to seek, interpret, and apply professional advice

D.7. Understands disaster preparedness and response and is familiar with the preparation of disaster policies

E. Processing and Cataloging

Special collections professionals provide for the processing and cataloging of materials in all formats that are under their care. Those with direct responsibilities in these areas achieve high-level technical skills and strong working knowledge of standards, practices, and tools. They establish effective working relationships with curators, public services staff, and the library's main technical services unit to ensure good communication and sound technical services policies for special collections. They advocate for best practices in the organization and description of primary resource materials.

Competencies

E.1. Uses knowledge of book history, book arts, the subject and historical context, physical characteristics, and production techniques of primary materials in order to ensure that the materials are appropriately and effectively organized, processed, and described

E.2. Uses knowledge of institutional priorities and resources to make decisions

about appropriate levels of processing and cataloging

E.3. Develops and maintains knowledge of standards, rules, best practices, and tools used for organizing and describing special collections materials in library catalogs, archival finding aids, databases, and Web sites

E.4. Understands integrated library systems, bibliographic utilities, and federated, Web-based platforms for sharing information about collections

E.5. Is familiar with local procedures concerning acquisitions, prioritization for processing, shelf preparation, collections management, and preservation for special collections materials

E.6. Develops and maintains knowledge of descriptive practices in related fields, such as archival and museum communities, and appropriately adopts and applies such practices to the description of special collections materials

F. Promotion and Outreach

Special collections professionals have a responsibility to promote the use of the collections in their care. They interpret and advance their collections through such means as exhibits, public programs, publications, presentations, lectures, conferences, and an online presence. They effectively represent their special collections organization and their profession to colleagues and outside communities. They seek ways to develop appreciation of their collections in particular and the preservation of cultural heritage in general. They build new and diverse audiences.

Competencies

F.1. Possesses well-developed oral and written communication skills in order to promote special collections effectively to diverse audiences, to inspire interest in the teaching, learning, and research potential of special collections materials, and to heighten commitments to the organization's purposes and programs

F.2. Is skilled in planning and implementing programs and publications that

promote and interpret the collections, such as exhibits, conferences, guest lectures, public speaking, and other active forms of outreach

F.3. Is skilled at using the repository's Web site effectively to promote awareness and use of collections

F.4. Is able to utilize the commercial media (newspapers, radio, television, Web) to promote awareness and use of special collections materials

G. Public Service

Special collections professionals provide effective public service that meets the needs of users while maintaining the collections in an optimally secure, conservationally sound environment. In support of learning, teaching, and research, special collections professionals seek to understand the scholarly needs and information-seeking behavior of their users, and they develop skills, resources, and services to meet those needs. They develop and maintain public service and access policies and practices that are consistent with the mission of their organization, adhere to the ethical standards of the profession, provide equitable and exemplary service to users, and maintain responsible stewardship of the collections. They also develop skills and knowledge to respond to trends in higher education as well as to rapidly changing technologies and the resulting shifts in user expectations.

Competencies

G.1. Provides effective and efficient public services in a special collections environment, including, but not limited to, circulation and reproduction services

G.2. Understands staffing and environments that balance the needs of researchers with the security and preservation needs of collections that can include fragile, unique, and special-format items

G.3. Develops and maintains equitable public service and access policies and is able to communicate those policies with staff and users

G.4. Understands the essential characteristics of reference service in order to assist, advise, and instruct users in the use of primary resources

G.5. Is skilled with bibliographic searching and is knowledgeable about reference sources, bibliographical sources, and information delivery systems

H. Teaching and Research

Special collections professionals participate in, and contribute to, the educational and research missions of their institutions as well as to the learning that occurs within their extended communities. They support and facilitate learning, teaching, and research, focusing on the use of primary sources in the institution's special collections. They develop knowledge of the content of the collections in order to instruct users in the value of appropriate primary resources and to assist researchers in locating relevant materials. They teach, write, and lecture based on the original materials in the collections.

Their work as educators requires a high degree of collaboration and effective promotion of the collections. They may use or support a variety of teaching methods: direct classroom teaching, individualized instruction, collaboration with faculty, curriculum development, consultation with researchers, Web-based tutorials, pathfinders and bibliographies, informational or instructional tours, and guest lecturing. They are aware of changing trends in education, scholarship, and learning.

Competencies

H.1. Understands the full scope of the teaching, learning, and research process and is able to work collaboratively with all participants in the process, recognizing and accommodating different learning styles and different teaching and learning methodologies

H.2. Understands pertinent disciplinary and interdisciplinary research methodologies and the research process, including the

relationship between research, the creation of knowledge, and publication;

H.3. For collections holding rare books, develops and maintains knowledge of the history of the book and the book arts, including but not limited to book construction, editions and variants, binding history, illustration techniques, typefaces, paper, parchment, and calligraphy

H.4. For collections holding archival and non-print materials, develops and maintains knowledge of the methods and materials that have been used to create and disseminate archival and non-print materials, including but not limited to the history of handwriting, copying techniques, and photographic processes

H.5. Is able to tailor presentations to meet the needs of particular audiences

H.6. Is competent in the use of information technologies to support teaching, learning, and research

H.7. Is able to instruct users in search strategies for locating relevant materials for primary source research

H.8. Is able to engage and collaborate with scholars to develop innovative teaching strategies and scholarly tools utilizing information technologies and special collections materials

H.9. Is committed to undertaking and supporting research, writing, and publication about rare and unique materials

Resources consulted by the RBMS Task force

1. ALA/RUSA Reference Guidelines: Professional Competencies for Reference and User Services Librarians, www.ala.org/ala/rusa/protocols/referenceguide/professional.cfm.

2. ALA/RUSA Reference Guidelines for Behavioral Performance of Reference and Information Service Providers, www.ala.org/ala/rusa/protocols/referenceguide/guidelinesbehavioral.cfm.

3. ALA-SAA Joint Statement on Access: Guidelines for Access to Original Research Materials, August 1994, www.ala.org/ala/acrl/acrlstandards/jointstatement.cfm.

4. ACRL Guidelines for Instruction Programs in Academic Libraries, www.ala.org/ala/acrl/acrlstandards/guidelinesinstruction.cfm.


Notes

1. www.arl.org/collect/spcoll/principles.html.

2. www.arl.org/collect/spcoll/.

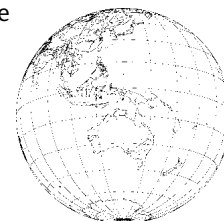
3. www.arl.org/bm~doc/sctf_ed.pdf.

4. Deirdre C. Stam, "Bridge that Gap! Education and Special Collections," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 7.1 (Spring 2006): 16–30, and Alice D. Schreyer, "What's So Special About Special Collections Librarians?" *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 7.1 (Spring 2006): 49–54.

5. www.aserl.org/statements/competencies/competencies.htm. 



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