

**EDUCATION AND TRAINING FOR CAREERS IN SPECIAL COLLECTIONS**  
**A WHITE PAPER PREPARED FOR**  
**THE ASSOCIATION OF RESEARCH LIBRARIES**  
**SPECIAL COLLECTIONS TASK FORCE**  
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*Comments on this white paper, and expressions of interest in working on the agenda identified in it, are welcome. Please contact Alice Schreyer, [schreyer@uchicago.edu](mailto:schreyer@uchicago.edu).*

**Executive Summary**

Responding to data gathered by the 1998 *Survey of Special Collections in ARL Libraries* and anecdotal evidence, the ARL Task Force on Special Collections investigated issues related to education and training needs for careers in special collections. The Task Force sought broad input from members of all engaged communities at an invitational meeting in Chapel Hill, North Carolina, in November 2003. The resulting white paper considers the scope of need, surveys the current environment, and proposes recommended strategies and action items for ARL and other organizations and groups.

There is a need for recruitment, education, and training of special collections at all career levels. Recent Ph.D.s are a prime focus of recruitment efforts, and interest among this pool is high; but limited educational opportunities and entry-level positions pose obstacles to entering the profession. At the same time, middle- and senior-level practitioners must enhance existing skills and develop new ones, especially managerial skills that will prepare them for positions of increased responsibility. Changing expectations of special collections librarians make it essential to define core

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competencies, which consist of general competencies required for all library positions and those that are unique to all or some positions in special collections. There is a need for multiple, flexible paths to education and training in special collections that reflect the diversity of individual backgrounds and positions.

The Task Force identified a number of emerging trends and initiatives that constitute an excellent foundation for collaborative, creative, and flexible education and training programs for careers in special collections. Despite the closing of library schools and curriculum changes at many others, most schools of library and information science offer pertinent courses; the Palmer School, Long Island University established a new concentration in Rare Books and Special Collections; and archival education programs are flourishing. Rare Book School at the University of Virginia provides an essential service, and continuing education activities of professional organizations such as RBMS and SAA make an important contribution to the current environment. Of special interest are two new initiatives – the ARL Academy and the Post-Doctoral Fellowship in Scholarly Information Resources for Humanists under the umbrella of the Council on Library and Information Resources (CLIR). While not focused specifically on special collections, both of these programs have the potential to serve those interested in the field and to provide models for future, specialized initiatives.

The environment for addressing the education and training needs for careers in special collections is changing rapidly, and the Task Force identified several programs that currently exist or are being developed that have potential to fill the needs it identified. The white paper emphasizes the need for ARL and the Special Collections Task Force to encourage, support, and monitor the progress of these initiatives; and to foster collaborations among ARL, educators, practitioners, professional organizations, and funding agencies. In particular, the Task Force identified articulating professional competencies needed for positions in special collections as a critical next step.. The Task Force also encourages library administrators, library school administrators, and professional organizations to develop creative and flexible approaches to train new special collections librarians, develop a shared culture between librarians and archivists,

and provide practitioners with opportunities for mid-career development and professional growth.

## I. Background

As part of its 2001 charge, the ARL Task Force on Special Collections was asked to consider education and training needs for careers in special collections (<http://www.arl.org/collect/spcoll/tforce/charge.html>). Several factors are seen as contributing to an emerging crisis. Library directors and special collections librarians report difficulty finding qualified candidates, especially for senior positions, while interested applicants are faced with few entry-level jobs. There are limited opportunities at library schools to take specialized courses in programs leading to the LIS (Library and Information Science) degree at the same time as there is a need to develop the next generation of well-qualified special collections personnel. According to *Special Collections in ARL Libraries: Results of the 1998 Survey Sponsored by the ARL Research Collections Committee* (ARL, 2001), 94 responding institutions anticipated filling on average 1.7 professional positions in special collections in the five years following the survey. Although data is not available to determine the accuracy of this prediction, Task Force discussions indicate that the number of special collections positions is not decreasing. Also in ARL libraries, more than a third of senior managers in the field of rare books and special collections will reach retirement age by 2010 (Stanley Wilder, *Demographic Change in Academic Librarianship*. ARL: 2003), prompting concern among Task Force members about future leadership. The Task Force does not believe these conditions are unique to ARL libraries; indeed the issues parallel trends throughout academic and research libraries in North America and internationally. For example the New York Public Library hosted an international meeting on “21<sup>st</sup> Century Curatorship” for library, museum, and information professionals as part of a Mellon-funded grant to the British Library to “to define the roles of the curator in the 21st century and to investigate what knowledge, experience, and skills would be required to fulfill these changing roles” (<http://www.nypl.org/research/curator/background.html>). Also in the U.K., the CILIP (Chartered Institute of Library and Information Professionals) Rare Books Group’s 2004 Study Conference, “Rare Book Futures: Curating Collections in the 21st Century,” addressed the fact that “rare books librarians need a wide range of managerial and technical skills to bring collections to life for the 21st century”

([www.cilip.org.uk/groups/rbg/](http://www.cilip.org.uk/groups/rbg/)). The 2005 RBMS Preconference topic is “Bridging the Gap: Education and Special Collections” (<http://www.rbms.nd.edu/>).

The demand for special collections personnel with appropriate professional and scholarly qualifications occurs at a time when special collections is being recognized as central to the mission of research libraries and as the skill set required for these positions is expanding. In 2003 the ARL Board of Directors endorsed a document developed by the Task Force, “Research Libraries and the Commitment to Special Collections” (<http://www.arl.org/collect/spcoll/principles.html>). Use of special collections is increasing, especially among undergraduates, and audiences for primary sources are expanding onsite and online. The success of the Task Force’s “Hidden Collections” initiative to expand access to unprocessed materials will depend upon the availability of a sufficient pool of trained staff who are committed to this goal (<http://www.arl.org/collect/spcoll/ehc/HiddenCollsWhitePaperJun6.pdf>). Technology is adding new responsibilities for developing, processing, and preserving collections in all formats. Previously-distinct job categories, often format-based, are blurring; and special collections librarians need to have a holistic understanding of the profession.<sup>□</sup>

The Task Force was charged specifically to “define core competencies among special collections librarians and create training opportunities.” A draft proposal prepared in October 2002 emphasized two strategies for education and training: an internship/residency program based at ARL libraries and open to those with advanced degrees, whether or not they also hold an LIS degree; and a short-term immersion course that would provide background in the culture of librarianship for those without an LIS degree. By that time other initiatives were under way that had the potential to offer

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<sup>□</sup> In this document, the term “special collections librarians” is used inclusively to mean staff who perform professional-level work in a special collections library or department, or with special collections materials. The term thus encompasses archivists, rare books librarians, manuscripts and graphic curators, conservators; technical, digital and subject specialists. The recently revised *ACRL Code of Ethics for Special Collections Librarians* includes the following definition: “Special collections librarian: An employee of a special collections library or any library staff member whose duties involve work with special collections materials” (<http://www.rbms.nd.edu/>).

similar opportunities. The Task Force decided to set its proposal aside in order to seek fuller information regarding parallel programs rather than duplicate efforts and compete for the same funding.

ARL also recognized the need to partner with other groups and organizations engaged in these issues, including the educational community, relevant organizations, and professional groups. Joe Hewitt, Task Force Chair, convened an invitational working meeting of participants representing many stakeholders – library directors, special collections librarians, LIS educators and administrators, representatives of RBMS and SAA – in Chapel Hill, North Carolina, November 10-11, 2003. (See <http://www.arl.org/collect/spcoll/tforce/mins1103.html> for Meeting Summary and names of attendees.)

Participants in the Chapel Hill meeting shared excitement about opportunities and a desire to address these issues with creativity, flexibility, and collaboration. This white paper is informed by discussions at the Chapel Hill meeting; consultation with archivists, manuscripts curators, and rare books librarians; and comments on a draft that was widely circulated among members of these communities. It is intended to portray the current environment of needs and opportunities for strengthening education and training for careers in special collections at a time of rapid change.

## **II. Scope of need**

*There is a need for recruitment, education, and training of special collections librarians at all career levels.*

Recruitment: The profession must attract individuals who have strong academic backgrounds and skills that are well suited to librarianship and to special collections in particular. There is considerable interest in attracting Ph.D.s to careers in special collections. Most major ARL and IRLA special collections are headed by Ph.D.s,

although the preference may be moving towards dual-degree holders (LIS and Ph.D.). The tight academic job market and other factors are encouraging Ph.D. holders and candidates to consider careers in libraries; a 2003 Yale symposium on “Things You Can Do with Books: Academic Careers in University Libraries” enjoyed enormous success. Because the recognized terminal degree for librarians is an LIS, to which many librarians have added a subject master’s, it will be important to involve current special collections staff in bringing Ph.D.s into the profession in order to avoid the tensions of a “two-tier” system. Students who have worked in special collections often go on to library school or internships. Mid-career librarians and career-changers should be encouraged to consider special collections, with appropriate recognition given to the work experience and life skills they bring to their new work. Archivists, in particular, have skills that are increasingly essential in special collections, and efforts must be made to bridge the cultural divide that too often separates archivists and librarians.

Early career opportunities: Library schools and academic libraries share a responsibility to help promising students build their careers. Especially because of the limited number of entry-level professional positions in academic and research libraries, post-graduate internships or fellowships are needed for recent LIS graduates to gain experience at the professional level and be socialized into the profession. Archival education programs regularly include an internship, and grant-funded term positions provide many archivists with entry-level professional experience, but the transition to continuing appointments is difficult.

Developing skills of practitioners (middle, senior level): In order for special collections librarians to enhance existing skills and develop new ones, more aggressive use of existing continuing education opportunities, research leaves, and sabbaticals should be promoted. Creative initiatives that prepare middle managers to assume increased responsibilities and move into senior positions are also needed. Staff with specialized training and experience in one area of special collections should be encouraged to broaden their scope as part of career development.

*There is a need to articulate competencies required by special collections librarians.*

Expectations of special collections librarians are changing rapidly, as in all areas of librarianship. Recommendations from the “Hidden Collections” conference suggest that traditional work such as cataloging and archival processing must be redefined and performed in new ways. Instruction, outreach, and interpretive services are assuming a much higher priority. The role of special collections librarians in development is expanding to encompass fundraising and to support library and university efforts in this area. And there are also completely new roles and responsibilities, particularly those requiring technological understanding and collaborative skills for creating, delivering, and preserving digital collections. Special collections librarians are increasingly working closely with colleagues across the library, often assuming leadership roles in digital library and archiving activities.

Paramount among the qualifications for special collections librarians is a strong academic background, increasingly being defined as a degree beyond the B.A. Graduate study is required to ensure first-hand knowledge of research methodologies; current trends in scholarship; and for some positions, subject expertise pertinent to the collection. Language skills are essential for special collections positions that involve cataloging, developing, and interpreting collections that contain materials in many languages; candidates well prepared in other areas may be weak in this qualification.

Special collections librarians must possess a number of competencies needed by all academic and research librarians: a strong service orientation; excellent teaching and public presentation abilities; organizational, management, and financial skills; the ability to work in a collaborative environment and to exercise leadership; innovation, creativity and above all flexibility. Within special collections librarianship, different specialized competencies are needed to describe, preserve, manage, interpret, and develop holdings that range from papyri, medieval and modern manuscripts, institutional archives, early printed and contemporary books, to the entire range of new media. But the Task Force feels it is possible to define a set of common or “core” competencies that relate

specifically to the stewardship role of special collections. A\*CENSUS (Archival Census and Education Needs Survey in the U.S.), an IMLS-funded survey in Spring 2004 being led by the Society of American Archivists, with participation by a number of related professional organizations, is gathering information that will be useful to this effort: “A\*CENSUS seeks to define the universe of archivists currently in the workforce, determine the knowledge and skills they need to do their jobs now and in the future, and provide graduate and continuing education programs with baseline data to support recruitment and training of new archivists “ (<http://www.archivists.org/a-census/>).

Examples of two types of competencies were identified by participants at the Chapel Hill meeting, as follows:

General competencies are necessary for all library positions. These include analytical skills (quantitative and qualitative studies), project management, oral/written communication skills, flexibility of mind (planning, scenario analysis), creativity/innovation, advocacy (ability to frame a message), digitization/technical skills, professional writing skills (research, thinking/organizing), understanding of organizational dynamics, budget and management skills, metrics (commitment and ability to measure impact of special collections), and political savvy, which may require experience to develop.

Competencies unique to all or some positions in special collections include intellectual curiosity that extends to interest in the materiality of the “stuff;” language skills; knowledge of private collecting, the auction and antiquarian book trade; knowledge of conservation principles and techniques; familiarity with pertinent legal and ethical issues (for example appraisals, taxes, gifts, rights management); knowledge of general and book history and bibliography; specific subject expertise; donor relations and development skills; willingness to accept the responsibility that artifacts impose; appreciation of the role of special collections in scholarship and instruction; and teaching skills. An elusive quality described as the “pizzazz factor” captures personal characteristics important for many special collections positions.

*There is a need for multiple, flexible paths to education and training for careers in special collections that reflect the diversity of individual backgrounds and positions.*

Credentialing/certification: The LIS experience and degree play a key role in education and training for special collections. Many libraries still require the LIS degree for professional appointments, sometimes to meet university expectations for the employment category that includes librarians. The library profession has considerable cohesion; and socialization into the shared values, vocabulary, and culture are an important component of career preparation. And within special collections, rare books and manuscript librarians and archivists need to place their work in the larger context of research librarians to foster effective collaboration. Many archivists work in research libraries, but many more do not. In 1989 the Academy of Certified Archivists was established to grant certification to professional archivists, based on criteria that include education, experience and an examination (<http://www.certifiedarchivists.org/>). In research libraries, advanced academic and/or professional degrees appear to be the preferred preparation for archival careers..

Short Courses: Technology, information management, and development professionals are increasingly in demand for library positions. As specialists enter the field without an LIS degree, there is a need to introduce them to the culture and functions of libraries. The concept of a short course aimed at professionals without an LIS degree offering intensive immersion in the concepts of librarianship has potential to meet this need. Similarly, an immersion course aimed specifically at special collections could serve as the initial step in a program for humanities Ph.D.s or other career changers.

Internships: Experience is an essential component of preparation for careers in special collections. Internships offered as part of a degree program provide LIS candidates with pre-professional experience; opportunities are needed to provide professional-level experience to new graduates and those entering the profession without an LIS.

### III. The Current Environment

*The Task Force identified a number of emerging trends and initiatives that constitute an excellent foundation for collaborative, creative, and flexible education and training programs for careers in special collections.*

Schools of Library and Information Science: As a result of library school closings and curriculum changes, few U.S. schools of library and information science today offer a comprehensive specialization in rare books or special collections in the context of the LIS program. However, according to an informal survey conducted by Deirdre Stam in the spring and summer of 2003, “courses in rare books and special collections are still offered, albeit infrequently and irregularly, in most ‘library schools.’ There is a pattern of courses consisting of some form of the history of the book; then, less frequently, a librarianship or curatorial course; often a preservation course that might have a hands-on component; very rarely a hands-on course by itself; and in a few cases a joint program with another department or institution.” However, a group of courses does not constitute a program, and full-fledged special collections programs are rare indeed.

Library school faculty and administrators at Chapel Hill reported interest in special collections among their students. Deirdre Stam reported on the “Models of Inclusion” approach taken by the Palmer School’s successful new concentration in Rare Books and Special Collections. The concentration exists within the LIS framework and takes advantage of many other resources to meet students’ needs. The Palmer School program has a cooperative arrangement with Rare Book School at the University of Virginia, and its students can receive credit for RBS courses. It also works closely with the New York Center for the Book, an affiliate of the Library of Congress Center for the Book. The Palmer School is exploring relationships with the Center for Book Arts (NYC), NYU and the Grolier Club, and is in discussion with other universities about establishing formal and informal arrangements.

Archival educational opportunities are more robust and interest is very strong, perhaps reflecting the wider scope of archival repositories offering employment opportunities.

Students interested in archival careers can find specialized programs and pursue a joint MA-LIS, options not readily available for those interested in other areas of special collections. The Society of American Archivists has promulgated “Guidelines for a Program in Archival Studies” (<http://www.archivists.org/prof-education/edd-index.asp>); an introduction to the archival profession outside of degree-granting programs is provided by Basic Institutes.

Librarians and educators at the Chapel Hill meeting discussed how schools of library and information science can enhance programs to prepare degree candidates for careers in special collections. LIS representatives expressed interest and openness to strengthening preparation for candidates to work in special collections, since the loss of jobs in the technology sector has refocused interest on libraries. A commitment to education for special collections on the part of all or even most schools of information and library science is not realistic or even necessary and advisable, because while there is student interest there is also wariness on the part of educators and students about concentrating in a specialized area with limited job opportunities.

Rare Book School: Rare Book School at the University of Virginia is a non-degree-granting program offering introductory and advanced courses in special collections librarianship and a number of specialized courses in book history, bibliography, archival description, and related topics. Rare Book School has become the leading program in the country for training new rare books librarians and furthering the continuing education of experienced practitioners. Although RBS works with the Palmer School of Long Island University to allow LIU students to receive credit toward their LIS degrees, Rare Book School is not formally part of a school of library and information science. At present it depends on special arrangements for support from the University of Virginia. Many research library directors who have sent staff to the School consider it an essential resource for maintaining the high quality of their special collections personnel and are concerned about the School’s long-term viability. Terry Belanger, University Professor and Honorary Curator of Special Collections, prepared a white paper for the Chapel Hill

meeting that described the School's programs, current status, support arrangements, and future prospects ([www.arl.org/collect/spcoll/RBSrevised.html](http://www.arl.org/collect/spcoll/RBSrevised.html)). The ARL community needs to help ensure the continuation of the School. A number of models for financial support were identified at the meeting; examples include subscriptions to RBS publications or institutional memberships in RBS that might include an annual meeting, receipt of publications, priority in enrollment, and other benefits.

Professional Organizations and New Initiatives: The current environment includes professional organizations that track educational opportunities and offer continuing education courses; and new initiatives for alternative pathways to librarianship that are of direct relevance to special collections.

- RBMS/SAA: Both the Rare Books and Manuscripts Section of ACRL/ALA, the principal professional organization for rare books and special collections librarians, with some participation by manuscripts librarians and archivists; and the Society of American Archivists, composed primarily of archivists and manuscripts librarians, have standing committees devoted to education and professional development. The annual meetings of both organizations combine sessions on theoretical and practical matters. SAA has a vigorous program of continuing education courses, and in recent years RBMS has presented workshops prior to the Preconference that offer more concentrated coverage and hands-on training than is possible in the Preconference seminar format. RBMS maintains an Educational Opportunities directory ([http://www.rbms.nd.edu/committees/membership\\_and\\_professional/educational\\_opportunities/](http://www.rbms.nd.edu/committees/membership_and_professional/educational_opportunities/)) that identifies courses related to special collections librarianship at many ALA-accredited library schools and describes numerous workshops and seminars in settings that include English and History departments, libraries, museums, and other academic organizations, and the Internet. SAA's Directory of Archival Education listings (<http://www.archivists.org/prof-education/edd-index.asp>) are published for a fee; a number of specialized and multi-disciplinary

- programs are included, such as those at the University of Michigan and the University of Maryland.
- **ARL:** ARL recently received an IMLS grant to establish the ARL Academy under the “Recruiting and Educating Librarians for the 21<sup>st</sup> Century” program. The goal is “to identify, educate, and give hands-on experience to new talent who can bring a depth of previously gained educational and professional experiences to academic and research libraries.” Components include tuition waiver for an LIS program at one of the partner schools (Catholic University of America, Simmons College, and the University of North Carolina at Chapel Hill), a Fellowship experience in an ARL library, mentoring, a Leadership Institute, and career placement. The option of focusing one or more fellowships on special collections will be explored.
  - **CLIR:** Ten universities are participating in the Post-Doctoral Fellowship in Scholarly Information Resources for Humanists that began in July 2004 under the umbrella of the Council on Library and Information Resources (CLIR). In their applications, recent humanities Ph.D.s proposed specific projects and identified libraries of particular interest, and CLIR matched candidates and libraries. Fellows attend an immersion course prior to the start of their appointments and a culminating session at its conclusion. The Mellon Foundation provided support for development of the immersion course, and participating libraries bear the cost of hosting Fellows. The program is considered an experiment; among the outcomes that will be watched are post-fellowship career paths and possible arrangements with library schools to grant credit for the fellowship experience.

### *Past Models*

CLIR: The internships sponsored by the Council on Library Resources were highly successful in identifying and nurturing potential leaders in the library profession.

Mellon Preservation Internships: In the early 1990s, as research libraries were putting formal preservation programs in place, it became apparent that there was a lack of professionals to administer them. The Andrew W. Mellon Foundation provided funding over a period of several years that enabled libraries with established programs to train a new generation equipped to take on the responsibilities of developing new programs elsewhere. Many of today's leaders in the preservation field began their careers as Mellon Preservation Interns, and the internship was a major factor in the expansion of preservation programs in research libraries.

Mellon grants for training area studies librarians: In 1995 the Andrew W. Mellon Foundation awarded Duke University a grant for "a post-doctoral program to train recent Ph.D. recipients in any field of Latin American studies as research librarians." According to the "Final Report," responding to a concern in the area studies community regarding a "shortage of qualified candidates for bibliographers positions," the program was designed to attract "to the field of Latin Americanist librarianship well-qualified candidates with both a strong subject background and the desire to pursue an alternative career (other than university teaching) that would take advantage of their Ph. D. training." Five individuals were trained, all of whom are now employed in suitable library positions for which they would not have been qualified candidates without the program. Participants in a concurrent program at Indiana University to train Africanists were not as successful in finding employment because they lacked the LIS credential. Their experience suggests that a broad change in the culture is needed to gain widespread acceptance of this approach.

#### **IV. Conclusion**

The ARL Special Collections Task Force is heartened by the keen interest within all the engaged communities in addressing the education and training needs for careers in special collections. A number of programs currently exist or are being developed that have potential to fill these needs. The Task Force concludes that at this time it would be most useful to call attention to these initiatives and undertake to support, encourage and

monitor them, rather than promulgate separate recommendations.

The Task Force recognizes the vital role played by Rare Book School under the leadership of Terry Belanger at the University of Virginia; and it believes that ARL has an important role to play in ensuring the future of RBS. The ARL Academy and the CLIR Postdoctoral fellowships programs are new avenues of education and training for academic research librarianship, and directors of ARL libraries that are sponsors of these programs can include a specific focus on special collections. As results of the A\*CENSUS survey are analyzed, additional needs identified by the archival community are also likely to emerge. It is of the utmost importance for ARL to support, encourage and monitor these projects. At the same time, the Task Force will continue to explore specialized courses and programs, such as a short-term immersion course accompanied by an internship, tailored to the needs of special collections librarians.

The Task Force believes that articulating competencies for candidates who seek positions in special collections is a tangible and critical next step. The professional organizations (ALA/ACRL/RBMS and SAA), and meeting participants in the NYPL meeting, are already engaged in this work. The Task Force intends to further these efforts by bringing the groups together as a way of encouraging dialogue and coordination.

The Task Force believes that a number of highly desirable developments are outside its scope but can be carried forward by the advocacy of individual Task Force members, ARL directors and other research library administrators. The goal is to foster collaborations among ARL, educators, practitioners, professional organizations, and funding agencies. Among these desired developments are: increased attention to education for work in or with special collections as part of LIS programs; flexible approaches to the LIS degree that combine recognition of an individual's prior academic background and experience with education and training for librarianship; encouraging ALA/ACRL/RBMS and SAA to collaborate in developing a shared culture between librarians and archivists; and providing special collections librarians in academic libraries

with opportunities for mid-career development and professional growth.

The Task Force believes these steps will assure that future special collections librarians are well prepared to take on responsibility for cultural heritage collections in research libraries.