THE UNIVERSITY OF BRITISH COLUMBIA
iSchool (Library, Archival & Information Studies)
Faculty of Arts

We acknowledge that we are on the traditional, ancestral and unceded territory of the hən̓q̓əmin̓əm̓ speaking Musqueam people.

**The mission of UBC iSchool is to enhance humanity's capacity to engage information in effective, creative and diverse ways, through innovative research, education and design.**

# ARST 556L / LIBR 514L Metadata Course Syllabus (3)

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| **Program**: | MAS and MLIS |
| **Year**: | 2021-2022 Winter Session Term 1 |
| **Course Schedule**: | Thursdays 2-5pm, Terrace Lab |
| **Instructor**: | Julia Bullard |
| **Office location**: | Zoom \| IBLC 480 |
| **Office phone**: | 604 822 2843 |
| **Office hours**: | TBD |
| **E-mail address**: | Canvas Inbox, julia.bullard@ubc.ca |
| **Learning Management Site:** | canvas.ubc.ca |

**Course Goal:** This course will give students a broad introduction to descriptive, structural, administrative, and use metadata covering metadata collection and generation, schema design and revision, and querying and analysis. This course will have a substantial practice component through lab activities. Technical work in the course will include the management of metadata within digital repository environments while class lectures and student research will cover a range of standards, applications, and contexts. Class material will include lectures covering course concepts and domains, lab sessions practicing related skills, and presentation days for students to report on individual investigation into areas of personal and professional interest.

**Course Objectives**:

| Upon completion of this course students will be able to: |
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| 1. Apply theories of information and documents to describe items, collections, and datasets through metadata; [1.2] |
| 2. Describe existing metadata standards in terms of scope, application, governance, and maintenance; [1.1] |
| 3. Understand the role that metadata plays in libraries, archives, and record management; [1.1, 1.4] |
| 4. Analyze and assess proposed and deployed metadata schemas for suitability, feasibility, and risk; [1.1] |
| 5. Design metadata schemas and application profiles around particular resources and contexts; [1.1,1.3] |
| 6. Manage metadata schemas and metadata records within a digital repository environment; [1.2] |
| 7. Express metadata in linked open data triples; [1.2] |
| 8. Query and analyze metadata datasets to assess collections and find relationships; [1.2] |
| 9. Assess and compare metadata models across various platforms; [1.1, 1.4] |
| 10. Understand critical perspectives on metadata including bias, labour, surveillance, and professionalization; [1.4, 4.1] |

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| 11. Communicate the relevance of metadata principles and practices to real world situations; [1.3, 2.1] |
| 12. Create and follow through on plans for professional development and practice in the domain of metadata that are accountable to the philosophy, principles and ethics of the profession. [5.1, 5.3] |

**Course Topics**:

- Metadata for items, collections, and datasets
- Metadata in library, archival, and record management contexts
- Metadata functions:
  - Access
  - Control
  - Description
  - Preservation
  - Relationships
  - Surveillance
- Metadata generation & collection
  - Traditional processes
  - Automated processes
  - Crowd processes
- Metadata principles:
  - Entities, attributes, and relations
  - Structures & encoding
  - Interoperability, extensibility, modularity, & hospitality
- Schema design & revision and application profiles

**Prerequisites**:
MLIS and Dual MAS/MLIS: Completion of MLIS Core. MAS: Completion of MAS core.

**Format of the course**:
For the first several weeks of the course, the content will be lecture-based with weekly design, analysis, and reflection activities. The final weeks of the course will be delivered by students in the class as they draft the outcome of their term projects. There will be peer assessment of assignments. There may be guest speakers for certain topics.

*50%, Online, weekly activities:*
For the first several weeks, I will post lectures online in advance of our weekly class session. The weekly content and assignment instructions will be within the recorded lecture and can also be accessed as a pptx or audio file. The weekly activity should take about 3 hours and is to be submitted on Canvas by the following Wednesday at 2pm. If you get your submission in by this deadline, you will participate in a peer review shuffle in which you will comment on 3 submissions from your classmates. If your assignment is late, you can still request feedback from me and I also encourage you to seek assignment exchange with other students in the same situation through the Canvas discussion boards.

*50%, In-class sessions:*
Each week there is an in-class session (time & room number is given on our Canvas homepage) for discussion and time to work on your weekly assignment and your end-of-term project. In-class sessions

are particularly important for students who work better in a structured environment, at a regular time, with the immediate availability of the instructor. Bring whatever materials you require for information seeking and creative tasks (a laptop, a notebook and pens, your current knitting project). To understand the requirements involved in-class sessions, please carefully read the following information about COVID safety on campus.

**COVID-19 Safety:** You are required to wear a non-medical mask during our class meetings, for your own protection and the safety and comfort of everyone else in the class. For our in-person meetings in this class, it is important that all of us feel as comfortable as possible engaging in class activities while sharing an indoor space. Non-medical masks that cover our noses and mouths are a primary tool for combating the spread of COVID-19. Further, according to the provincial mandate, masks are required in all indoor public spaces including lobbies, hallways, stairwells, elevators, classrooms and labs. There may be students who have medical accommodations for not wearing a mask.

**If you are sick, it is important that you stay home**. Complete a self-assessment for COVID-19 symptoms here: https://bc.thrive.health/covid19/en. In this class, the marking scheme is intended to provide flexibility so that you can prioritize your health and still succeed.

**If I (the instructor) am feeling ill:** If I am unwell, I will not come to class. I will make every reasonable attempt to communicate plans for class as soon as possible (by email, on Canvas, etc.). Our classroom will still be available for you to sit in and work. If I am well enough to teach, but am taking precautions to avoid infecting others, we may hold the class online. If this happens, you will receive an announcement in Canvas informing you how to join the class.

**Required Reading**:

- Duval, Eric, Wayne Hodgins, Stuart Sutton, and Stu Weibel. (2002) Metadata principles and practicalities. *D-Lib.* Available at: http://dlib.org/dlib/april02/weibel/04weibel.html
- Elings, Mary W., and Günter Waibel. (2007). "Metadata for all: Descriptive standards and metadata sharing across libraries, archives and museums." *First Monday 12*(3).
- Millerand, F., & Bowker, G. C. (2009). Metadata standards: Trajectories and enactment in the life of an ontology. *Standards and their stories: How quantifying, classifying, and formalizingpractices shape everyday life*, 149-165.
- Pomerantz, Jeffrey. (2015) *Metadata*. Boston: MIT Press. (**This book accounts for half the reading in this course. UBC Libraries has an ebook copy and you can get a print copy for ~$20**).
- Ribes, David. 2017. Notes on the concept of data interoperability: cases from an ecology of AIDS research infrastructures. *Proceedings of the 2017 ACM Conference on Computer Supported Cooperative Work and Social Computing* 2017, 1514-1526

**Course Assignments:**
This course is based on students' own plans and priorities for the material and their desired course outcomes. At the beginning of the term, you'll work on your own, individualized version of the syllabus. In the middle of the term, you'll check in with the instructor to determine your chosen term project and discuss how to evaluate yourself. At the end of the term, you will present a case for a grade you **assign yourself** based on your progress toward your course objectives. This may be radically different from grading in your previous coursework. Questions and discussion about the process are expected and welcome.

| Assignment Name | Key Weeks | Estimated Hours/120 | Weight | Peer Activities |
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| Individual Student Plan | Weeks 1, 2, 7 | 20 | Ungraded | |
| Course Notes and Reflections | Weeks 2-6, 9-12 | 20 | Ungraded | Optional collaboration |
| Lab Activities and Tutorials | Weeks 3-5 | 20 | Ungraded | Peer review; Optional collaboration |
| Term Project | Weeks 7-12 | 40 | Ungraded | Peer evaluation |
| Portfolio | Week 13 | 20 | 100% | |

*Individual Student Plan:*
Early in the term you will individually submit a plan with professional development goals within the domain of metadata. The instructor will use your plan to advise you on a term project and check-in with you on your goals at the midpoint of the course. Possible goals may be informed by sample job requirements and could include:

- Familiarity with a particular metadata standard;
- Experience explaining metadata operations to peers; or
- Understanding the role of metadata in a particular context.

These goals should align with the course learning outcomes, prioritize among these outcomes, and specify versions of outcomes central to your goals. Your plan can reference extracurricular activities to develop particular skills.

*Term Project:*
Your term project will take a different form depending on your overall goals for the course. Broadly, projects can align to one of the three foci of the course: metadata design (e.g., planning new schemas for a given collection), metadata collection (e.g., designing modes of metadata input, such as crowdsourcing and the training for those doing item description), and metadata processing (e.g., approaches to fixing data cleanliness issues). When you submit your individual student plan at the beginning of the course, you will suggest what project you'd like to pursue. Term projects that are practical in nature, such as technical tutorials and small scale or pilot metadata projects are welcome, as are more conceptual or research-focused projects, including first drafts of papers for publication or study design proposals. If you have a work placement or other course work with relevance to metadata, you can propose a simultaneous submission or resubmission of that work if it matches the topic of this course.

At the mid-way point of the course, you should have a clear idea of what shape your term project will take. Your project plan should include:

- What skills, knowledge, or competencies the project will require you to develop (alternatively, what the project will provide evidence you're able to do);
- How the project fits into the overall course;
- When you will have a draft version of the project ready to share with peers; and
- What type of engagement you need from the instructor and your peers. For example, if you are designing a training module for metadata collection or redesigning a tutorial for data cleaning, you may need a small group of your classmates to pilot it. If you are writing a paper for publication, you may want a run-through of the peer review process.

All term projects are meant to be shared with the entire class and to contribute to your peers' understanding of metadata.

*Portfolio*

Throughout the term you will develop an ePortfolio documenting progress toward your goals. Your portfolio can feature:

- Your course notes from lectures and labs;
- Your term project and peer feedback you receive; and
- Related work from other courses and work experience.

Your portfolio should include your reflection on your progress through the course, the links between your weekly work and course concepts, and the next steps you'll take to build on these skills. You can provide this reflection on individual items, through a reflective post on the collection as a whole, and through the organization of the items themselves. There are two check-in phases (midway through the course and the end of the course) during which you should meet with the instructor to discuss the portfolio assignment and your weekly work to date.

As part of the final submission of your portfolio, you will assess the grade you earned through your work in the course. You are welcome to use the scheduled check-ins and other meetings with the instructor to discuss how to assess your work in the course. The instructor may adjust the grade you give in your assessment but will not punish you for overshooting or reward you for being overly modest.

As a suggestion on estimating your grade, consider the iSchool grading policy, in which a B corresponds to "Solid work meeting the basic course requirements," an A as "Consistently excellent work demonstrating high degree of analytical ability, creativity, and clarity of expression," and a C as "Work barely permitting a pass in the single course."

**Course Schedule [week-by-week]:**

Readings will be available through the Canvas site (check Library Online Course Reserves within the course page).

| Week # | Topic | Activities | Readings | Class Date |
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| 1 | Introduction to the course | Job application search & summary<br>Individual student plan | Course syllabus<br>Pomerantz Chs 1-2 | September 9 |
| 2 | Types of metadata: descriptive, administrative, technical, use | Course notes<br>Individual student plan | Pomerantz Chs 3-5 | September 16 |
| 3 | Metadata design | Course notes<br>Metadata schema setup | Pomerantz Chs 6-8<br>DTES RAP documentation | September 23 |
| 4 | National Truth and Reconciliation Day – NO CLASS | | | September 30 |
| 5 | Metadata collection | Course notes<br>Crowdsourced metadata participation | Duval, Hodgins, Sutton, & Weibel 2002<br>Elings & Waibel 2007<br>Frogbear documentation | October 7 |
| 6 | Metadata processing | Course notes<br>OpenRefine tutorial | Ribes 2017<br>OpenRefine documentation | October 14 |

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| 7 | Student meetings | Individual or group meetings<br>Term project planning | | October 21 |
| 8 | Student meetings | Term project planning<br>Sign up for a presentation / draft week | | October 28 |
| 9 | Student presentations and student-led activities<br>Individual presentations / drafts<br>Peer evaluations<br>Student-assigned readings | | | November 4 |
| 10 | | | | November 18 |
| 11 | | | | November 25 |
| 12 | Student meetings | Peer evaluations | | December 2 |

**Evaluation**: All assignments will be marked using the evaluative criteria given on the iSchool web site.

**Required Materials:** All reading material is available through Canvas and UBC Libraries.

**Policies and Resources to Support Student Success**: UBC provides resources to support student learning and to maintain healthy lifestyles but recognizes that sometimes crises arise and so there are additional resources to access including those for survivors of sexual violence. UBC values respect for the person and ideas of all members of the academic community. Harassment and discrimination are not tolerated nor is suppression of academic freedom. UBC provides appropriate accommodation for students with disabilities and for religious and cultural observances. UBC values academic honesty and students are expected to acknowledge the ideas generated by others and to uphold the highest academic standards in all of their actions. Details of the policies and how to access support are available here (https://senate.ubc.ca/policies-resources-support-student-success)

**Academic Integrity:** The academic enterprise is founded on honesty, civility, and integrity. As members of this enterprise, all students are expected to know, understand, and follow the codes of conduct regarding academic integrity. At the most basic level, this means submitting only original work done by you and acknowledging all sources of information or ideas and attributing them to others as required. This also means you should not cheat, copy, or mislead others about what is your work. Violations of academic integrity (i.e., misconduct) lead to the breakdown of the academic enterprise, and therefore serious consequences arise and harsh sanctions are imposed. For example, incidences of plagiarism or cheating may result in a mark of zero on the assignment or exam and more serious consequences may apply when the matter is referred to the Office of the Dean. Careful records are kept in order to monitor and prevent recurrences. A more detailed description of academic integrity, including the University's policies and procedures, may be found in the UBC Calendar: Student Conduct and Discipline. Academic misconduct includes cheating, plagiarism, and self-plagiarism http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,54,111,959 (§7)

**Academic Accommodation for Students with Disabilities:** Academic accommodations help students with a disability or ongoing medical condition overcome challenges that may affect their academic success. Students requiring academic accommodations must register with the Centre for Accessibility (previously known as Access & Diversity). The Centre will determine that student's eligibility for accommodations in accordance with Policy LR7: Accommodation for Students with Disabilities (Joint Senate and Board Policy). Academic accommodations are not determined by your instructors, and instructors should not ask you about the nature of your disability or ongoing medical condition, or request copies of your disability documentation. However, your instructor may consult with the Centre for Accessibility should the accommodations affect the essential learning outcomes of a course.

**Conflicting Responsibilities:** UBC recognizes that students may occasionally have conflicting responsibilities that affect their ability to attend class or examinations. These may include: representing the University, the province or the country in a competition or performance; serving in the Canadian military; or observing a religious rite. They may also include a change in a student's situation that unexpectedly requires that student to work or take responsibility for the care of a family member, if these were not pre-existing situations at the start of term.

Students with conflicting responsibilities have a duty to arrange their course schedules so as to avoid, as much as possible, any conflicts with course requirements. As soon as conflicting responsibilities arise, students must notify either their instructor(s) or their Faculty Advising Office (e.g. Arts Academic Advising), and can request academic concession. Instructors may not be able to comply with all such requests if the academic standards and integrity of the course or program would be compromised. Varsity student-athletes should discuss any anticipated and unavoidable regular-season absences with the instructor at the start of term, and provide notice of playoff or championship absences in writing as soon as dates are confirmed.

Religious observance may preclude attending classes or examinations at certain times. In accordance with the UBC Policy on Religious Holidays, students who wish to be accommodated for religious reasons must notify their instructors in writing at least two weeks in advance. Instructors provide opportunity for such students to make up work or examinations missed without penalty.