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.

iSchool Mission: Through innovative research, education and design, our mission is to enhance humanity's capacity to engage information in effective, creative and diverse ways.

ARST556L / LIBR514L Metadata – Course Syllabus (3)

Program:	MAS and MLIS
Year:	2019-2020
Course Schedule:	Mondays 2-5pm
Location:	Terrace Lab
Instructor:	Julia Bullard
Office location:	480
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Learning Management Site:	http://lthub.ubc.ca/guides/canvas/

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 sessions. Labs in this course will focus on the management of metadata within digital repository environments while class lectures and student research will cover a range of standards, applications, and contexts. Class sessions will rotate weekly among three formats: 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:

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]
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
- Standards: URI, DC, XML, RDF, MODS, EAD, Schema.org & more!
- Open and linked metadata & triples
- Normalizing, translating, & transforming metadata
- Querying & analyzing metadata records
- Sustainability and long-term issues
- Labour & accountability in metadata

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

Format of the course: This class alternates among three formats: a lecture and readings discussion week, a lab week with in-class exercises; and a presentation week of student work. Students should complete the required reading by the first class of each module and be prepared to participate each week, whether in discussion, lab work, or peer feedback.

Required and Recommended Reading:

Required:

- 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).
- Long, Kara, Santi Thompson, Sarah Potvin, and Monica Rivero. (2017) The wicked problem of neutral description: a documentation perspective to metadata standards. *Cataloging and Classification Quarterly 55*(3): 107-128.
- 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.
- 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

Recommended Reading - Standards
- Those linked from http://www.metadataetc.org/book-website/readings/appendixaschemas.htm
- ISO 23081: Information and Documentation—Records Management Processes—Metadata for Records

Course Assignments,

Assignment	Learning Outcomes	Deliverable	Assessment	Value
Lab activities	LO 1, 2, 3, 4, 5, 6, 7, 8	4 Lab reports	Completeness & accuracy	4 x 10% **40%** total
Topic presentation	LO 2, 3, 4, 9, 10, 11	Presentation	Presentation delivery (peer assessment) Sophistication of analysis	**20%**
Individual student plan	LO 12	Course plan, Portfolio, & Professional development plan	Completeness, suitability, self-assessment	5% for plan 20% for portfolio 5% for plan **30%** total
Participation	LO 11		Discussion in lecture weeks; feedback to presentations; professionalism in all sessions	**10%**

Lab activities:
The class will have 4 lab sessions (1 per module) focusing on interactions with metadata systems. Lab tasks will be assessed through lab reports. Some lab activities will take place within the digital repository management system.

Topic Presentations:
Once during the term each student (individually, or as pairs) will deliver a short presentation on individual research into a metadata topic. Students will choose topics consistent with their individual plans and schedule them within the most appropriate module (collection, processing, or use). Individual research can focus on academic publications and/or metadata documentation and may be supplemented by media publications and personal experience. Sample topics include:
- Collection: Crowdsourcing metadata; Passive collection of metadata; Diplomatics; Quality control;
- Processing: Interoperability of standards; Crosswalks; Retention & Deletion;
- Use: Security & access; APIs, Secondary analysis; Surveillance; Research data management; Data visualization; Unintended consequences.

Individual Student Plan:
Early in the term students will individually submit plans with professional development goals within the domain of metadata. In the second week of class students will discuss their plans in groups in order to deliver their plan to the instructor in the following class. The instructor will use the plan to help students pick topic presentations and check-in with the students on their 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 the student's goals. The student's plan can reference extracurricular activities to develop particular skills.

Throughout the term each student will develop an ePortfolio documenting their progress toward their goals. Students will present their ePortfolios at the end of the term and receive peer feedback. ePortfolios will be graded by how well they provide evidence of progress toward the student's stated learning outcomes. After receiving feedback students will deliver revised plans for professional development which can include course work, workshops, or other means of developing their competencies in this domain.

Course Schedule [week-by-week]:

Module	Week/Day	Class Format	Readings	Deliverables
Introduction to metadata: For items, collections, and datasets In library, archival, and record management contexts Principles	1 – Jan 6	Lecture	Course syllabus	
	2 – Jan 13	Lab 1	Pomerantz Chs 1-2 Digital repository interface documentation	Lab Report #1
Collection: Metadata generation & collection Metadata functions	3 – Jan 20	Lecture	Pomerantz Chs 3-5 Duval, Hodgins, Sutton, & Weibel 2002	Individual Plan
	4 – Jan 27	Lab 2		Lab Report #2
	5 – Feb 3	Presentations		
Processing: Schemas & application profiles Standards Triples Normalizing, translating, & transforming	6 – Feb 10	Lecture	Pomerantz Chs 6-8 Elings & Waibel 2007 Standard of choice (e.g., CWDA, EAD)	Check-in on individual plan
	Feb 17 – Reading Week			
	7 – Feb 24	Lab 3		Lab Report #3
	8 – Mar 2	Presentations		
Use: Querying & analyzing records Sustainability, labour, accountability, and unintended consequences	9 – Mar 9	Lecture	Long, Thompson, Potvin & Rivero 2017 Millerand & Bowker 2009 Ribes 2017	
	10 – Mar 16			
	11 – Mar 23	Lab 4		Lab Report #4
	12 – Mar 30	Presentations		Portfolio
Wrap-up	13 – Apr 6	Portfolio Discussions		Revised Plan

Attendance: Attendance is required in all class meetings. If you know you are going to be absent you must inform me beforehand if at all possible.

Evaluation: All assignments will be marked using the evaluative criteria given on the [iSchool web site](#). Labs will be graded for completeness and accuracy; if you miss these in-class assignments please speak to me as soon as possible to arrange an alternative session.

Required Materials: Pomerantz, Jeffrey. (2015) Metadata. Boston: MIT Press. ($20 paperback & full ebook access through 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)

Centre for Accessibility: Centre for Accessibility works with the University to create an inclusive living and learning environment in which all students can thrive. The University accommodates students with disabilities who have registered with the Centre for Accessibility unit: [https://students.ubc.ca/about-student-services/centre-for-accessibility]. You must register with the Disability Resource Centre to be granted special accommodations for any on-going conditions.

Religious Accommodation: The University accommodates students whose religious obligations conflict with attendance, submitting assignments, or completing scheduled tests and examinations. Please let your instructor know in advance, preferably in the first week of class, if you will require any accommodation on these grounds. Students who plan to be absent for family obligations, or other similar commitments, cannot assume they will be accommodated, and should discuss with the instructor before the course drop date. UBC policy on Religious Holidays: http://equity.ubc.ca/days-of-significance-calendar/

Academic Integrity
Plagiarism

The Faculty of Arts considers plagiarism to be the most serious academic offence that a student can commit. Regardless of whether or not it was committed intentionally, plagiarism has serious academic consequences and can result in expulsion from the university. Plagiarism involves the improper use of somebody else's words or ideas in one's work. The UBC policy on Academic Misconduct is available here: http://www.calendar.ubc.ca/Vancouver/index.cfm?tree=3,54,111,959.

It is your responsibility to make sure you fully understand what plagiarism is. Many students who think they understand plagiarism do in fact commit what UBC calls "reckless plagiarism." The UBC Learning Commons has a resource page on how to avoid plagiarism, with policies on academic integrity and misconduct found here: [http://learningcommons.ubc.ca/resource-guides/avoid-plagiarism/

If after reading these materials you still are unsure about how to properly use sources in your work, please ask your instructor for clarification.