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.

LIBR 509 Foundations of Resource Description and Knowledge Organization – Course Syllabus (3)

Program:	MLIS
Year:	2022-2023 Winter Session Term 2
Course Schedule:	Thursdays 2-5pm, Irving K. Barber Learning Centre room 155
Instructor:	Julia Bullard
Office location:	Zoom	IBLC 480
Office phone:	604 822 2843
Drop-in hours:	Zoom (linked in Canvas) hours TBA, also available by appointment
E-mail address:	Canvas Inbox, julia.bullard@ubc.ca
Learning Management Site:	canvas.ubc.ca

Course Goal: This course serves as an introduction to issues in organization of information and documents including: analysis of intellectual and physical characteristics of documents; principles and practice in surrogate creation, including standards and selection of metadata elements; theory of classification, including semantic relationships and facet analysis; creation of controlled vocabularies; and display and arrangement. This course provides the student with the analytical tools to assess how information is organized in an information system.

Course Objectives:

Upon completion of this course students will be able to:

1. Describe the basic nature and characteristics of documents [1.2]
2. Describe the basic purposes and processes of authority control [1.1]
3. Explain core issues in the selection, arrangement, and formation of metadata elements in surrogates [1.2]
4. Analyze and classify subjects on a conceptual level [1.2, 2.1]
5. Compare different types of classification schemes and controlled vocabularies [1.2, 2.1]
6. Describe the purposes of bibliographic control and resource discovery [1.2, 2.1]
7. Describe the general role of resource description and access in the information transfer process, and its particular role in information systems design and operation [1.1, 1.2]

Course Topics:

- representation, organization, and control of information
- bibliographic control
- documents and works in information systems
- catalogues and their objectives and functions

- resource description
- resource access
- authority control
- encoding descriptions and data formats
- interpreting documents for their significant characteristics
- vocabulary control for information systems
- subject languages
- classificatory structures
- metadata for resource discovery

Prerequisites:
MLIS & Dual students: Corequisite LIBR 508

Format of the course:
This course will primarily be delivered through lectures and weekly design and analysis activities. There are two periods in the course in which you will schedule a meeting with the instructor. There may be guest speakers for certain topics. Non-graded homework is given most weeks of the course. There will be peer assessment of non-graded assignments.

50%, Online, weekly activities:
Each week, I will post lecture videos online in advance of our scheduled class session. The lecture can also be accessed as a pptx or audio file. The weekly content and assignment instructions will be within the lecture. 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 the TA and instructor 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 in your course schedule and our Canvas homepage) for discussion, collaborative activities, and time to work on your weekly assignment and peer reviews. 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: Per the most recent UBC Broadcast, you are no longer required to wear a mask, yet UBC recommends that you do in indoor public spaces. Daily health checks and frequent hand-washing are advisable. Whether you choose to wear a mask or not, please be mindful and accepting of each other's choices and comfort levels as we navigate the new academic year. Please maintain a respectful environment (UBC Respectful Environment Statement).

If you are sick, it is important that you stay home. If you have COVID, or contagious symptoms typical of COVID, you should not come to class. In this class, the online activities and weekly assignment 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.

Course Assignments:
The primary mode of evaluation in this course is peer- and self-evaluation. At the end of the term, you will present a case for a grade you **assign yourself** based on your progress toward the 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	Due Date	Weight	Graduate Competencies
Classification – Create	January 26	Ungraded	1.1, 1.2
Thesaurus – Create	February 2	Ungraded	1.1, 1.2
Content Schema – Create	February 9	Ungraded	1.1, 1.2
Classification – Analyze	February 16	Ungraded	1.1, 2.1
Controlled Vocabulary – Analyze	March 9	Ungraded	1.1, 2.1
Content Standard – Analyze	March 16	Ungraded	1.1, 2.1
Data Format – Analyze	March 23	Ungraded	1.1, 2.1
Systems Integration – Analyze	March 30	Ungraded	1.1, 2.1
Systems Integration – Create	April 6	Ungraded	1.1, 1.2, 2.1
Portfolio	April 17	100%	1.1, 1.2, 2.1

"Create" Assignments
In 4 of the weekly assignments (weeks 2, 3, 4, 11) you will create a small-scale organizing system using the principles taught in the course. Specific instructions for each assignment are posted in Canvas. Each assignment should take about 3 hours, including choosing a subject, working out the terminology and structure of the system, and formatting it for submission. There is no penalty for not completing these assignments or completing them late. However, each submission helps you prepare your final portfolio. Completing the assignments during their designated week also allows you to participate in peer review, which allows you to see more attempts at these systems and to have constructive feedback on your own attempt.

Each submission will be randomly assigned to 3 students for peer review. When peer reviewing other submissions, use the concepts from the course to check for consistency, note strengths in the system, and make suggestions for improvements. Reviewing 3 submissions should take you about 2 hours.

The instructor and TA will give feedback on assignments randomly through spot check and by request.

"Analyze" Assignments
In 5 of the weekly assignments (weeks 6, 7, 8, 9, 10) you will write a brief synopsis and critique of an organizing system that exists (or existed) in the world. Specific instructions for each assignment are posted in Canvas. Each assignment should take about 3 hours, including identifying a relevant system, finding relevant information about the system, and writing your impression for submission. There is no penalty for not completing these assignments or completing them late. However, each submission

helps you prepare your final portfolio. Completing the assignments during their designated week also allows you to participate in peer review.

Each submission will be randomly assigned to 3 students for peer review. When peer reviewing other submissions, note what the analysis adds to what has already been covered in the course and what questions you have after reading. Reviewing 3 submissions should take you about 2 hours.

The instructor and TA will give feedback on assignments randomly through spot check and by request.

Portfolio
At the end of the course, you will submit a portfolio created in the UBC Arts ePortfolio platform that documents your progress toward the competencies of the course. Your portfolio can feature:
- Your weekly assignments, after integration of peer feedback;
- The peer feedback you offered to others, after removing identifying information; and
- Related work from other courses and work experience.

The more of the ungraded weekly assignments and peer review you complete throughout the term the more material you will have to include in your portfolio and the better coverage you will have of the competencies and skills targeted in this course.

Your portfolio should include your reflection on your progress through the course, the links between your submissions 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 reflection post on the collection as a whole, and through the organization of the items themselves.

There are two check-in phases in the course during which you can meet individually with the instructor to discuss the portfolio assignment and your weekly work to date. The first check-in occurs at weeks 5 and 6 and is mandatory; the second occurs at week 12 and is optional.

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 and TA 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 are from the open online textbook, *The Discipline of Organizing: Professional Edition* (abbreviating as *DoO* here), or available through the Canvas site (check Library Online Course Reserves within the course page). These readings are subject to change; the "Readings" page within each weekly module will have the most current and complete list of readings.

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Topic	Readings	Class Date
Introduction	Required: *DoO*, section 1.1 (pgs. 25-32) Suggested: *DoO*, sections 1.2-1.9 (pgs. 33-52)	January 12
Classification Principles	Required: *DoO* sections 7.3-7.3.3.3, 8.2 Suggested: *DoO* sections 7.2, 7.4, 8.1	January 19
Thesaurus Principles	Required: *DoO* section 6.4 Aitchison, J., Gilchrist, A., & Bawden, D. (2000). Section F1: Structure and relationships. In *Thesaurus Construction and Use: A Practical Manual*, 4th ed. (pp. 47-63). Suggested: *DoO* section 4.4	January 26
Content Standard Principles	Required: *DoO* sections 5.1, 5.3 DCMI Metadata Terms, section 3 https://www.dublincore.org/specifications/dublin-core/dcmi-terms/#section-3 - skim the description of each element in the /elements/1.1/ namespace Suggested: *DoO* section 5.4 Using Dublin Core https://www.dublincore.org/specifications/dublin-core/usageguide/ section 1 (Introduction)	February 2
Classification in Libraries	Required: *DoO* section 8.3 Suggested: Doyle, A., Lawson, K., & Dupont, S. (2015). Indigenization of knowledge organization at the Xwi7xwa Library. *Journal Of Library & Information Studies, 13*(2), 107-134.	February 9
Check-in Week	UBC Arts ePortfolio instructions https://ubcarts.ca/ & iSchool ePortfolio workshop Schedule a meeting with the instructor (instructions in Canvas).	February 16
Reading Week – No Class		February 23

Thesauri in Libraries	Required: Library of Congress Cataloguing & Acquisitions. Process for Adding and Revising Library of Congress Subject Headings https://www.loc.gov/aba/cataloging/subject/lcsh-process.html Bone, C., & Lougheed, B. (2018). Library of Congress Subject Headings Related to Indigenous Peoples: Changing LCSH for Use in a Canadian Archival Context. *Cataloging & Classification Quarterly, 56*(1), 83–95.	March 2
Cataloguing and Metadata in Libraries	Required: *DoO* section 5.2 Suggested: Long, K., Thompson, S., Potvin, S., & Rivero, M. (2017). The "Wicked Problem" of Neutral Description: Toward a Documentation Approach to Metadata Standards. Cataloging & Classification Quarterly, 55(3), 107–128. https://doi.org/10.1080/01639374.2016.1278419	March 9
Data Formats in Libraries	Required: *DoO* sections 9.1-9.4 Suggested: Overview of the BIBFRAME 2.0 Model https://www.loc.gov/bibframe/docs/bibframe2-model.html Kiryakos, S. and Sugimoto, S. (2019), "Building a bibliographic hierarchy for manga through the aggregation of institutional and hobbyist descriptions", *Journal of Documentation, Vol. 75* No. 2, pp. 287-313. https://doi.org/10.1108/JD-06-2018-0089	March 16
Systems Integration in Libraries	Required: DoO sections 11.5-11.6 and one case study from DoO of your choice (12.x) Suggested: The remainder of DoO 11 and McCloud, S. (1994). Chapter 2: The Vocabulary of Comics. In Understanding Comics: The Invisible Art. New York: Kitchen Sink Press.	March 23
Systems Integration Principles	Required: Zhou, L. (2003) Characteristics of Material Organization and Classification in the Kinsey Institute Library, *Cataloging & Classification Quarterly, 35*:3-4, 335-353, DOI: 10.1300/ J104v35n03_04 Suggested:	March 30

	Zhou, Liana H. (2018) "Bodies of Evidence: Understanding the Transformation of Collections from Individuals to Institutions." *Library Trends 66*, no. 4: 568–84. https://doi.org/10/gfx5v7	
Review and Check-In	Required: *DoO*, section 1.1 (pgs. 25-32) Optional: Theimer, S. (2012). A cataloger's resolution to become more creative: How and why. Cataloging & Classification Quarterly, 50(8), 894–902.	April 6
Review and Check-In	No readings or in-class session. Schedule a meeting with the instructor. Portfolio due April 17	April 13

Thank You: I developed this course from a previous version taught by Dr. Aaron Loerhlein and I thank him for those materials. I am also indebted to Sarah Gilbert for her help in revising the course assignments in 2018 and to Bri Watson for their help in launching the ungraded version of the course in 2020.

Evaluation: All assignments will be marked using the evaluative criteria given on the iSchool web site. Extensions will be granted upon request with no late penalties.

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.