University of Toronto
Faculty of Information
Winter 2017

INF2145: Creation and Organization of Bibliographic Records
COURSE SYLLABUS

Instructor: Elisa Sze, Collections & Public Services Librarian at the Inforum
Course location: BL 224/225
Course time: Tuesday 9 am-12 pm

Contacting the Instructor

Email: elisa.sze@utoronto.ca → *Enter the course code* <u>*INF2145*</u> *at the start of your subject line*
Office telephone: (416) 978-7071
Office location: Inforum
Office hours: By appointment

I will respond to all INF2145 messages within 2-3 calendar days. If you do not hear back from me after the third day, please follow up with me.

Announcements regarding the course will be made in class or via Blackboard.

Course Description (Course Calendar Entry)

This course examines the problems in creating and organizing bibliographic records for monographs, serials, government documents, audio-visual materials and other information sources, in both manual and automated environments. This course also analyzes and evaluates solutions from various cataloguing codes and other international standards.

Pre-requisites: INF1320 or INF1331

Statement of Acknowledgment of Traditional Land

We wish to acknowledge this land on which the University of Toronto operates.

For thousands of years it has been the traditional land of the Huron-Wendat, the Seneca, and most recently, the Mississaugas of the Credit River.

Today, this meeting place is still the home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land.

Course Learning Outcomes

Often referred to as *cataloguing*, the creation and organization of bibliographic records have been integral to many aspects of bibliographic work. This course builds upon basic principles and methods of information organization by focusing specifically on their application. Although intended for students interested in a career in libraries, the knowledge and skills

gained from this course are transferrable to other settings in which collections of "things" need to be described, organized, and made available for discovery, access, and use.

By the end of the course, students should be familiar with:

- The principles and practices of creating and organizing bibliographic and authority data
- The models and standards used within the international cataloguing community
- The problems of description and access for materials of varying formats, and possible solutions for improving the search, retrieval, and discovery of them
- The application of content and encoding standards to library materials
- Current and future roles for bibliographic and authority data within information management practices and beyond

Relationship to MI Program Learning Outcomes

This course meets the following Student Learning Outcomes (SLO) for the MI program (http://current.ischool.utoronto.ca/studies/learning-outcomes):

- Through lectures, readings, exercises, and assignments, students will become conversant in the standards of bibliographic and authority control. This will enrich their overall appreciation for the "fundamental concepts, theories, practices, and [the] diverse horizons of information disciplines" and enable them to "respond to changing information practice and needs of society" (SLO 1).
- The final assignment, which requires students to position themselves as a topic expert, hones skills that are useful in leadership and training settings (SLO 2).
- Through course assignments, students will understand the "development of theory concerning information, where it is found, and how it is used", particularly in settings in which the organization and discovery of information are fundamental to the functions of those organizations (SLO 4).
- Discussions around catalogues, discovery layers, integrated library systems, cloud-based library service platforms, and new uses for bibliographic and authority data will enable students to "develop an understanding of the application of new technological developments to the preservation and communication of information, and in the identification of the impact of such developments on society" (SLO 5).

Class Preparation

Cataloguing is an intellectual as well as skills-based activity. The best way to learn cataloguing is to practice it. As such, iterative hands-on exercises form an important component of the coursework. In preparation for each class, you will be expected to have completed the required readings, reviewed the course material covered in the previous week, and attempted the ungraded homework assignments. Lecture slides, class announcements, and supplementary material will be posted to Blackboard. When in class, be ready to participate in discussions and activities.

For details on how your final grade will be broken down, see the section of this syllabus entitled

"Evaluation".

Required readings will be made available in one of the following ways, depending on the source of the material:

- Blackboard or LOCR (Library Online Course Reserves); or
- Inforum Course Reserves; or
- Direct from the publisher, with a link embedded in the course syllabus

The instructor would like to thank Anna Oh, Course Support & Public Services Technician at the Inforum, for her assistance with making readings available on Course Reserves and in LOCR.

Course Policies

Attendance

You are requested to attend each class and to be punctual. If you miss a class or a portion of class, it is your responsibility to cover the course content that you miss.

Classroom Conduct

As a courtesy to your colleagues, please avoid disruptive classroom behaviour such as arriving late, leaving early, holding private conversations during class time, or interrupting others while they are speaking.

Use of Electronic Devices in Class

For the purpose of consulting cataloguing resources and utilities, most of which are accessed online, you are strongly encouraged to bring a Wi-Fi-enabled device to each class, such as a laptop or tablet. A limited number of networked computers are also available in the classroom, and you may be asked to share a computer with your classmates. Use of electronic devices in the classroom for non-academic purposes is discouraged.

Grading

Grading in this course is based on the iSchool's Grade Interpretation Guidelines (http://current.ischool.utoronto.ca/grade-interpretation) and the University Assessment and Grading Practices Policy (http://www.governingcouncil.utoronto.ca/Assets/Governing+Council+Digital+Assets/Policies/PDF/grading.pdf). These documents will form the basis for grading in the course.

Assignments

All assignments are to be your individual work. While you may chat with classmates, or look up reference resources in order to assist you with the interpretation of cataloguing standards, you are strongly discouraged from consulting cataloguers, library staff, or online cataloguing

forums and mailing lists, as a means of completing your assignments.

Late Policy for Assignments

Unless otherwise stated, all assignments are due <u>in class</u> on the day that they are due. Any assignments received after class will be considered late. Unless prior arrangements have been approved in writing by the instructor, late submission of an assignment carries an automatic penalty of 2% per calendar day. After 5 calendar days, late assignments will not be accepted.

Extensions without Penalty during the Term

Requests for an extension on assignments will only be granted in the event of legitimate illness or emergency, and then only once appropriate written documentation has been submitted.

Extensions beyond the End of the Term

Extensions beyond the term in which the course is taken are subject to guidelines established by the School of Graduate Studies (SGS), https://www.sgs.utoronto.ca/currentstudents/Pages/Extensions.aspx.

Writing Support

As stated in the iSchool's Grade Interpretation Guidelines, "work that is not well written and grammatically correct will not generally be considered eligible for a grade in the A range, regardless of its quality in other respects". With this in mind, please make use of the writing support provided to graduate students by the SGS Office of English Language and Writing Support (http://www.sgs.utoronto.ca/currentstudents/Pages/English-Language-and-Writing-Support.aspx). The services are designed to target the needs of both native and non-native speakers and all programs are free. Please consult the current workshop schedule (http://www.sgs.utoronto.ca/currentstudents/Pages/Current-Years-Courses.aspx) for more information.

Academic Integrity

Please consult the University's site on Academic Integrity (http://academicintegrity.utoronto.ca/). **The iSchool has a zero-tolerance policy on plagiarism** as defined in section B.I.1.(d) of the University's Code of Behaviour on Academic Matters (http://www.governingcouncil.utoronto.ca/policies/behaveac.htm). You should acquaint yourself with the Code. Please review the material in the *Cite It Right* workshop and if you require further clarification, consult the site *How Not to Plagiarize* (http://www.writing.utoronto.ca/advice/using-sources/how-not-to-plagiarize).

Cite It Right covers relevant parts of the U of T Code of Behaviour on Academic Matters (1995). It is expected that all iSchool students take the *Cite It Right* workshop and the online quiz. Completion of the online Cite It Right quiz should be made prior to the second week of classes. To review and complete the workshop, visit the orientation portion of the iSkills site: uoft.me/iskills. **If you have not completed *Cite It Right* yet, speak to me as soon as possible.**

Citations

In keeping with the iSchool's zero-tolerance policy on plagiarism, all individual and group assignments must contain complete and consistent references and attributions. When preparing your assignment, follow **one** of these citation manuals: APA or Chicago.

The *Publication Manual of the American Psychological Association*, 6th edition (2010)
- Is available in print from multiple libraries at the St. George Campus, including the Inforum: http://go.utlib.ca/cat/6784923
- Online resources that you cite in APA style should follow the *APA Style Guide to Electronic References*, http://go.utlib.ca/cat/8526099.

The *Chicago Manual of Style*, 16th edition, is available online at http://simplelink. library.utoronto.ca/url.cfm/65161

Accommodations

Students with diverse learning styles and needs are welcome in this course. If you have a disability or a health consideration that may require accommodations, please feel free to approach me and/or the **Accessibility Services Office** (http://www.studentlife. utoronto.ca/as) as soon as possible. The Accessibility Services staff are available by appointment to assess needs, provide referrals and arrange appropriate accommodations. The sooner you let them and I know your needs, the quicker we can assist you in achieving your learning goals in this course.

Evaluation

Your final grade will be based on the following components:

Description	Weight towards Final Grade	Due Date
Open-book Quizzes (Note: Only your best 3 of 4 quiz scores will be counted, each for a weight of 5%)	15%	Jan. 17 Jan. 24 Feb. 7 Mar. 21
Assignment #1: Descriptive Records	25%	February 14
Assignment #2: Access Points	30%	March 7
Assignment #3: Non-book Cataloguing Instructions	30%	April 4

Open-book Quizzes (Course Weight: 3 x 5% = 15%)

I will be administering 4 open-book quizzes during the term, but only your top 3 quiz scores will count towards your final grade. (In other words, your lowest of 4 quiz scores will be dropped.) The quizzes will test your retention of course material, and enable you to practice

what you have learned. Solutions will be discussed in class after all the quizzes have been graded.

With the exception of documented illness/emergency, missed quizzes cannot be retaken, and will be assigned a grade of 0.

Assignment 1: Descriptive Records (Course Weight: 25%) – Due Feb. 14

You will be supplied with photocopies taken from 3 books. For this assignment, you will create a descriptive record for each of the 3 books, and write a brief paper discussing the challenges you encountered and how you made your cataloguing decisions. The assignment is meant to give you the opportunity to catalogue according to RDA guidelines within a MARC21 environment.

Detailed instructions will be provided at least 4 weeks before the due date.

Assignment #2: Access Points (Course Weight: 30%) – Due Mar. 7

You will be assigned a set of bibliographic records, which stand in as surrogates of items held in a library collection. You will also be provided with a package of supplementary information. Note that none of the access points in the bibliographic record have been verified or authorized. Your job is to establish authorized access points to the best of your ability, based on the supplementary information provided, as well as any secondary sources that you may end up consulting.

Detailed instructions will be provided at least 4 weeks before the due date.

Assignment 3: Non-Book Cataloguing Instructions (Course Weight: 30%) – Due Apr. 4

Imagine that you have just been hired by a small special library to catalogue its library collection. You supervise a part-time employee who is eager to assist you with cataloguing the non-book items in this collection. They have a basic knowledge of book cataloguing, but have never dealt with non-book items. Selecting one of the given special library scenarios, (1) write a short discussion paper that identifies the challenges of cataloguing and processing your chosen type of collection, keeping in mind the target user group(s) of the collection, and (2) create a technical instruction sheet that summarizes for your staff the typical metadata that need to be captured and encoded for your chosen type of collection.

Detailed instructions will be provided at least 4 weeks before the due date.

Weekly Course Schedule & Corresponding Readings

Week	Date	Description	Due Dates
1	Jan. 10	**Introduction: Principles, Standards and Frameworks** **Required Reading**	

Week	Date	Description	Due Dates
		IFLA. (2009). *Statement of International Cataloguing Principles.* Retrieved at: http://www.ifla.org/files/assets/cataloguing/icp/icp_2009-en.pdf Taylor, A.G. & Joudrey, D.N. (2009). Cataloging. In Bates, M. and Maack, M.N. (ed.), *Encyclopedia of Library and Information Sciences,* 3rd ed. Retrieved at: http://www.crcnetbase.com.myaccess.library.utoronto.ca/doi/abs/10.1081/E-ELIS3-120044500 Tillett, B. (2004). *What is FRBR?* Retrieved at: https://www.loc.gov/cds/downloads/FRBR.PDF *RDA Toolkit* (Login will be provided by the instructor): • Chapter 0. Introduction	
2	Jan. 17	**Standards of Descriptive Cataloguing: AACR2 and RDA** **Required Reading** Joudrey, D.N., Taylor, A.G., and Miller, D.P. (2015). Chapter 3: Description and Access. In *Introduction to Cataloging and Classification*, 11th ed. Santa Barbara, California: Libraries Unlimited. pp. 51-125. Inforum Course Reserves Z693 .T39 2015. *RDA Toolkit*: • Chapter 1. General Guidelines on Recording Attributes of Manifestations and Items • Chapter 2. Identifying Manifestations and Items • Chapter 3. Describing Carriers • Chapter 7. Describing Content	Quiz 1
3	Jan. 24	**RDA: Works & Expressions** **Authority Control** **Required Reading** Joudrey, D.N., Taylor, A.G., and Miller, D.P. (2015). Chapter 10: Authority Control. In *Introduction to Cataloging and Classification*, 11th ed. Santa Barbara, California: Libraries Unlimited. pp. 501-518. Inforum Course Reserves Z693 .T39 2015.	Quiz 2

Week	Date	Description	Due Dates
		RDA Toolkit: - Chapter 5. General Guidelines on Recording Attributes of Works and Expressions - Chapter 6. Identifying Works and Expressions	
4	Jan. 31	**Encoding Data about Entities and Relationships** **Required Reading** *RDA Toolkit:* - Chapter 8: Recording Relationships between Works, Expressions, Manifestations, & Items - Chapter 9: Recording Relationships between Persons, Families, & Corporate Bodies - Appendices I, J, K, L, & M Library of Congress. (2009). *Understanding MARC Bibliographic.* Retrieved at: https://www.loc.gov/marc/umb/ Library of Congress. (2004). *Understanding MARC Authority Records.* Retrieved at: https://www.loc.gov/marc/uma/index.html	
5	Feb. 7	**Encoding Data (Continued)** **Required Reading** Greenberg, J. (2009). Metadata and Digital Information. In Bates, M. and Maack, M.N. (ed.), *Encyclopedia of Library and Information Sciences*, 3rd ed. Retrieved at: http://www.crcnetbase.com.myaccess.library.utoronto.ca/doi/full/10.1081/E-ELIS3-120044415 Myntti, J. (2014). Linked Data. In Bates, M. and Maack, M.N. (ed.), *Encyclopedia of Library and Information Sciences*, 3rd ed. Retrieved at: http://www.crcnetbase.com.myaccess.library.utoronto.ca/doi/full/10.1081/E-ELIS3-120049498 **Supplementary Reading** Godby, C.J., Wang, S., and Mixter, J.K. (2015). *Library Linked Data in the Cloud: OCLC's Experiments with New Models of Resource Description.* San Rafael, California: Morgan & Claypool. Retrieved at: http://go.utlib.ca/cat/10511800	Quiz 3

Week	Date	Description	Due Dates
6	Feb. 14	**Subject Analysis** **Required Reading** Read ONE of these: • Chan, L.M. and Salaba, A. (2016). Chapter 10: Principles of Controlled Vocabularies and Subject Analysis. In *Cataloging and Classification: An Introduction*, 4th ed. Lanham, MD: Rowman & Littlefield. pp. 465-486. Available Blackboard – Library Online Course Reserves, and Inforum Stacks Z693 .C437 2016. OR • Joudrey, D.N., Taylor, A.G., and Miller, D.P. (2015). Chapter 11 & 12. In *Introduction to Cataloging and Classification*, 11th ed. Santa Barbara, California: Libraries Unlimited. pp. 521-555. Inforum Course Reserves Z693 .T39 2015. AND Bristow, B. (Ed.). (2014). Principles of the Sears List. In Sears, M., *Sears List of Subject Headings*, 21st ed. Retrieved at: https://www.ebscohost.com/promoMaterials/SearsFM.pdf **Supplementary Reading** Skim through: • Sears, M. (2014). *Sears List of Subject Headings*, 21st ed. New York: H. W. Wilson Co. Inforum Reference Z695 .Z8 S43 2014	Assignment 1 due in class
	Feb. 21	READING WEEK – NO CLASS	
7	Feb. 28	**Library of Congress Subject Headings** **Required Reading** Library of Congress. (2016). H 180: Assigning and Constructing Subject Headings. In *Library of Congress Subject Heading Manual PDF Files.* Retrieved at: https://www.loc.gov/aba/publications/FreeSHM/H0180.pdf Read Section I OR Section II of: • Berman, S. (1993). *Prejudices and Antipathies: A Tract on the LC Subject Heads Concerning People*. Jefferson, NC:	

Week	Date	Description	Due Dates
		McFarland. Inforum Course Reserves Z695 .Z8 L534 1993 **Supplementary Reading** Skim any of these: - Book Industry Study Group. (2016). *BISAC Subject Headings List*. Retrieved at: http://bisg.org/page/BISACEdition J. Paul Getty Trust. (2015). About the AAT. In *Art and Architecture Thesaurus Online*. Retrieved at: http://www.getty.edu/research/tools/vocabularies/aat/about.html - Sears, M. (2014). *Sears List of Subject Headings,* 21st ed. New York: H. W. Wilson Co. Inforum Reference Z695 .Z8 S43 2014	
8	Mar. 7	**Dewey Decimal Classification** **Required Reading** OCLC. (2011). Introduction to the Dewey Decimal Classification. *Dewey Decimal Classification,* 23rd ed. http://www.oclc.org/content/dam/oclc/dewey/versions/print/intro.pdf **Supplementary Reading** Skim any of these: - Markham Public Library. (2011, July 15). C3 Customer Centred Classification. C3 Categories. http://www.slideshare.net/dmacklin/c3-categories?from_action=save - Gnoli, C. (Ed.). (2005). Colon Classification: An Outline with Examples. http://www.iskoi.org/doc/colon.htm - UDC Universal Decimal Classification [website] http://www.udcc.org/index.php/site/page?view=about for the following pages: "About UDC", "UDC Scope", "UDC Structure & Tables", and "UDC Notation"	Assignment 2 due in class
9	Mar. 14	**Library of Congress Classification** **Required Reading** Library of Congress. (2015). F 010: General Principles of	

Week	Date	Description	Due Dates
		Classification. In *Library of Congress Classification and Shelflisting Manual*. https://www.loc.gov/aba/publications/FreeCSM/freecsm.html Skim through any LC class schedule, downloadable from: https://www.loc.gov/aba/publications/FreeLCC/freelcc.html **Supplementary Reading** Skim through: • Chan, L.M., Intner, S.S., and Weihs, J. (2016). *Guide to the Library of Congress Classification*, 6th ed. Santa Barbara, California: Libraries Unlimited. Inforum Course Reserves Z696 .U4 C47 2016.	
10	Mar. 21	**Non-book Cataloguing** **Guest Speakers** **Supplementary Reading** Skim any of these: Baca, M., Harpring, P., Lanzi, E., McRae, L., Whiteside, A., and the Visual Resources Association. (2006). Introduction and Part I: General Guidelines. In *Cataloging Cultural Objects: A Guide to Describing Cultural Works and their Images*. Chicago: ALA. pp. xi-41. Inforum Course Reserves CC135 .C37 2006 Canadian Council of Archives. (2008). Statement of Principles. In *Rules for Archival Description*, 2008 revision. Retrieved at: http://www.cdncouncilarchives.ca/RAD/RAD_Principles_July2008.pdf Houston, C. (2016). *Organizing Information in School Libraries: Basic Principles and New Rules*. Santa Barbara, California: Libraries Unlimited. Inforum Course Reserves Z693 .H685 2016 Mangan, E.U. (Ed.). (2003). *Cartographic Materials: A Manual of Interpretation for AACR2, 2002 revision*. Chicago: ALA. Inforum Course Reserves Z695.6 .C37 2003 Olson, N.B. (2008). *Cataloging of Audiovisual Materials and Other Special Materials: A Manual Based on AACR2 and MARC 21*, 5th	Quiz 4

Week	Date	Description	Due Dates
		ed. Westport, Connecticut: Libraries Unlimited. Inforum Course Reserves Z695.66 .O43 2008 RBMS Bibliographic Standards Committee. (2011). *Descriptive Cataloging of Rare Materials: Books*. Washington, DC: Library of Congress Cataloging Distribution Service. Retrieved at: http://rbms.info/files/dcrm/dcrmb/DCRMB3.pdf	
11	Mar. 28	**Cataloguing Platforms & Putting It All Together** **Required Reading** Library of Congress. (2016.) *Overview of the BIBFRAME 2.0 Model*. Retrieved at: https://www.loc.gov/bibframe/docs/bibframe2-model.html	
12	Apr. 4	**The Future of Cataloguing**	Assignment 3 due in class

Academic Dates: http://current.ischool.utoronto.ca/studies/academic-dates
- Final date to drop full-year and winter session half (S) courses without academic penalty: Monday, Feb. 27, 2017
- For students obtaining degrees at the June Convocation, coursework must be completed and grades submitted by Monday, Apr. 17, 2017

[Reading List Service provided and links accessed by the Inforum: Winter term, 2016-2017]