IST 602: INFORMATION AND KNOWLEDGE ORGANIZATION
Spring 2017 (Online)

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(synchronous office hours: BLS Office Hours Chat)

Course Description
The course is an introduction to fundamental concepts, theoretical principles, and practices of knowledge and information organization. This course covers essential concepts and techniques that are used to facilitate access to information resources.

The key themes include:
- Subject Analysis (Ofness and Aboutness)
- Vocabulary Control and Thesauri
- Systematic Classification
- Information Representation and Information Discovery
- Authority Control
- Metadata
- Organization of Non-textual Information
- Social Classification, and
- User Perspectives in Information Organization

Course Objectives
- to introduce the principles, theories, standards, and methods for information and knowledge organization;
- to understand the relationship between information organization and information discovery in information retrieval systems;
- to discuss approaches for understanding users to meet their information needs in the information organization systems and practices and;
- to promote critical thinking and problem solving abilities for addressing challenges of information organization in the digital age.

Course design and teaching methodologies
This is an online course which will be delivered through the Blackboard Learning System (BLS). Each module will consist of readings, reading questions, lecture notes (ppt slides), class discussions, and additional resources. Team discussions should be asynchronously participated within time provided (mostly weekly). Students are required to read and watch assigned
materials and to participate in course activities in each module. Supplemental readings may be added.

**Course Learning Activities and Evaluation Guidelines: Masters Students**

Below are descriptions of the activities you will engage in during this course. *Please note that this is NOT a self-paced course.* For most tasks and assignments, you will have a window of time, from 5 days to 2 weeks, to complete a task.

The course is graded out of 100 points. There is 2-point of "extra credit" built into the course. Your grade will be based on the following breakdown:

<table>
<thead>
<tr>
<th>Item</th>
<th>Points Each</th>
<th>Total Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading Questions</td>
<td>1</td>
<td>9 (1x9)</td>
</tr>
<tr>
<td>Module Discussions</td>
<td>2</td>
<td>18 (2x9)</td>
</tr>
<tr>
<td>Assignments</td>
<td>15</td>
<td>45 (15x3)</td>
</tr>
<tr>
<td>Final Project (A Literature Review paper and a virtual presentation)</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>102</strong></td>
</tr>
</tbody>
</table>

All content for this course will be delivered though your course textbook and additional readings. At the start of each unit, you will need to read the assigned chapter(s) and articles.

Each module will have *Reading Questions*. These are questions for you to find the answers from the assigned readings. For some questions, you may synthesize multiple readings to answer. For other questions, you may develop your own thoughts based on readings.

Based on the readings and other course materials, you need to participate in discussions each module (*Module Discussions*). The discussions will be conducted as team. You will be assigned to a team based on your concentration track, self-identified field experiences and skills on information technology. In Team Discussions, only “active participation” will be counted in grades. Please see the *Discussion Rubric* for criteria and qualities for “active participation.” Once the discussions are completed for given cases and/or questions, your team needs to submit collective response to share with other teams at the Class Discussion forum. Please response to other teams’ responses to facilitate a sense of community.

You can decide on role assignments in your team who will aggregate the discussion and/or compile a response in what module. You can use forums in *Module Discussions*, Chit Chat Central and Class Email for informal communication with your team members. There is a notification function in BLS for new messages in discussion forums and/or class email. You can edit your notification settings to choose what updates you want to hear about and where you want those updates (email, phone, etc.).

You will find many materials to help you understand course content in each module. This includes assigned readings, lecture notes, related video clips, further readings, etc. These
materials are selected to help you identify key terms, concepts, and important applications. If you find any concepts or material to be unclear, you can create a post for assistance in the **Ask a Question** forum. A classmate or the instructor will respond to your inquiry there.

In addition to each module’s grading activities (**Module Discussions**—team discussions and team responses; **Reading Questions**—individual assignment), there are three short written assignments, and a final project. Each grading component will be assessed as follows:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
<th>How it will be evaluated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module Discussions</td>
<td>This is a team activity. During each grading module, you will discuss some major questions with your teammates.</td>
<td>Each forum is worth 2 point. In order to earn full credit, you must actively participate in each team forum to help the team organize, synthesize, and create answers.* You need create at least one active post per discussion question and two responses to other member’s post in the module’s forum. Once discussion is done, share your discussions in a synthesized manner with other teams. For some discussion questions, there are no clear right and wrong answers. In this case, your team will have to justify your answers with reasonable inferences.* Please see the <strong>Discussion Rubric</strong>.</td>
</tr>
<tr>
<td>Reading Questions</td>
<td>Reading questions are to guide your reading. They are provided to draw your attention to important content in each module.</td>
<td>Response to reading questions in each module is worth 1 point. Students can use this assignment to make notes on readings for themselves. There will be no specific ways to do this: bullet points, narratives, or any methods that would work for you should be fine. Students who answer all the questions will receive the point.</td>
</tr>
<tr>
<td>Assignments</td>
<td>There are three small written assignments. These are designed for you to review, experience, and analyze some practical applications/systems based on concepts and theories leaned in modules.</td>
<td>The instructions and grading guidelines of these assignments will be provided at least two weeks in advance in the <strong>Assignments</strong> menu. There will be major discussion points to be included in these assignments. Grades will be given based on comprehensiveness of coverage for those discussion points, depths of discussions in analysis, and evidence of critical thinking.</td>
</tr>
<tr>
<td>Final Project</td>
<td>The final project for this course is a research paper based on comprehensive literature review. In this paper, you will examine some problems of the knowledge and information organization systems of your interests.</td>
<td>The instructions and grading guidelines for the research paper and virtual presentation will be provided in the <strong>Assignments</strong> menu. You need to critically and comprehensively review the existing literature on a topic. The key to be successful in this assignment is to choose a narrow and focused topic. A literature review is not summarizing related materials one by one. The paper should be written</td>
</tr>
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based on the critical review of existing literature for author’s position (or argument) based on a good understanding of the topic.
You need to submit your paper topic and a preliminary bibliography by 2/27. The paper and virtual presentation are due in the last week of class.

NOTE: All assignments for this course will be submitted electronically through BLS unless otherwise instructed. Submission through email will not be accepted.

Course Learning Activities and Evaluation Guidelines: Doctoral Students

Doctoral students will do all the module activities (see above): Reading Questions and Module Discussions (team discussions and team responses).

Doctoral students will not do all three short written assignments, but choose one from the three. Instead of having several small projects and a literature review paper, doctoral students will write a publishable research paper of 25-35 pages on any aspect of information organization that the student is interested in or that relates to the student's ongoing dissertation research. Students need to submit a research proposal by 2/20. The research proposal should include problem statement, preliminary study of existing literature, and proposed research methodology, and expecting results. The full paper is due on the last week of the class (5/8).

Students should demonstrate the evidence of a wide reading of the existing literature and can look at the topic from a theoretical or applied perspective. Examples of topics for this paper include any problems and issues related information organization systems (information systems, vocabulary systems, classifications, and other related technology and applications), information behavior studies and user studies in relation to information organization practices/systems, new digital cultures and the web environment for information organization, information organization in various domains (archives, museums, and other types of information providing centers), information organizations for various formats of information, etc. Doctoral students can also make a case for conducting a literature review or research paper related to their planned or possible dissertation projects. Doctoral students who go beyond the library and information science literature in their background reading will do better on this paper, producing something with potential for publication. The grade for a paper submitted by a doctoral student is based on its potential for publication or its relevance for development of a dissertation proposal.

The final grade for Doctoral students will be based on the following:

<table>
<thead>
<tr>
<th>Item</th>
<th>Points Each</th>
<th>Total Points (Percent of Grade)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion Forums</td>
<td>2</td>
<td>18 (1x9)</td>
</tr>
<tr>
<td>Reading Questions</td>
<td>1</td>
<td>9 (1x9)</td>
</tr>
<tr>
<td>Choose one from three assignments</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Final Paper</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>102</strong></td>
</tr>
</tbody>
</table>
Course Exit Competencies
At the end of this course, students will generally understand:

• Fundamental concepts of basic terms being used in the field of information studies and information organization
• How basic concepts and principles for organizing information are applied in the design of information systems
• Fundamentals of major classificatory structures and systems
• The purposes and functions of surrogates of information in information discovery
• The roles and different types of metadata for representing digital resources
• The importance of users in the information providing organizations and systems
• Different methods and approaches to organize information in archives, museums, and other types of information providing institutions
• Collective organization and information architecture for internet resources

Text

Course Expectations and Policies
What I expect from you:
An online course requires you, the student, to be in control of your learning. In a face-to-face (F2F) course, I can play a much bigger role in actively directing your learning, since I see you once a week. In an online course, I have to do a lot more work in designing an appropriate learning environment, so that you can learn at your convenience. Since you are in control, you need to be disciplined enough to stay up to date with the course. The following tips will help you succeed in the course:

Blackboard Login: Log in to BLS every day to view announcements, discussion posts and replies to your posts. You may need to log in multiple times a day when team discussions are due.

Manage your Time: This is a course where you are expected to internalize a broad variety of concepts with your own control. This requires good planning. Good planning allows you to plan for the unexpected sickness, travel requirements, Internet outages etc. Allow for 8-10 hours per week on this course, which would mean about 2 hours per day for 4 to 5 days of the week. This is no different than a F2F course, where we meet for about 3 hours (class attendance) and you do at least 4-6 hours of work (reading, assignments, etc.) outside the classroom. This is not a class that you can log into once a week and pass!

Keep track of due dates: Use the calendar tool on BLS to keep track of due dates. Print out the schedule or the syllabus, but look for updates on BLS.

What your peers expect from you:
Netiquettes: Please observe proper "netiquette" -- courteous and appropriate forms of communication and interaction over the Internet (within your online course). This means no personal attacks, obscene language, or intolerant expression. All viewpoints should be respected.

Remember that the person receiving your message is someone like you, someone who deserves and appreciates courtesy and respect.

- Be brief. Succinct, thoughtful messages have the greatest impact.
- Your messages reflect on YOU. Take time to make sure that you are proud of their form and content.
- Use descriptive subject headings in e-mail messages.
- Think about your audience and the relevance of your messages.
- Be careful with humor and sarcasm; without the voice inflections and body language of face-to-face communication, Internet messages can be easily misinterpreted.
- When making follow-up comments, summarize the parts of the message to which you are responding.
- Avoid repeating what has already been said. Needless repetition is ineffective communication.
- Cite appropriate references whenever using someone else's ideas, thoughts, or words.

Giving Feedback: This course is designed along the principles of synergy and collaborative learning. Therefore, it is important that all students understand how to provide quality feedback to their peers. Here are a few tips for providing, positive, constructive, and useful feedback to peers:

- Be empathetic and remember that this environment is a safe place for making mistakes.
- Use nonjudgmental language and phrases that do not attack an individual. One way of doing this is to ask the individual to discuss his/her process for making the final decision.
- Use specific questions, examples, and references to research as a way of making your point.
- Make your feedback useful by providing suggestions that the individual can understand and use to improve her/his work.

What you can expect from me:

As your instructor, I am committed to providing a quality learning experience through thoughtful planning, implementation, and assessment of course activities. I am also committed to being readily available to students throughout the semester by

1. having synchronous sessions (office hours: Mondays 1-4, Wednesdays 10-12)
2. replying to questions in the forum/email within 24 to 48 hours
3. and to returning graded course work with feedback within a week from each assignment's due date.

Module time frame

Each module starts on Monday and ends on Sunday. For example, if a module is for the week of 1/30, students will read, study, and complete module activities from 1/30(Mon) to 2/5(Sun).
Each module's activities can be submitted anytime during this time frame. For Module Discussions, which are a team activity, you can decide on a small time window within a week to efficiently manage time or to avoid weekends for schoolwork among your team member. For example, your team can decide Wednesdays and Thursdays for this activity, so that you don't have to check for team discussion forums throughout the week.

**Late assignments, make-up work and incompletes:**
Late assignment will be marked down (10% per day), unless prior permission has been given by the instructor, in instances of medical or family emergencies. Please notify the instructor in writing of any circumstance accompanying with appropriate documents that will result in a late assignment. Any assignment that is more than 5 days late will not be accepted. If a student has a legitimate reason and documentation, the instructor might allow the student to do makeup work. The amount and nature of the work is up to the instructor’s discretion. It will be graded at the end of the term. No incomplete grades will be given.

**Department of Information Studies Statement on Academic Dishonesty:**
The Department of Information Studies takes academic dishonesty very seriously. Before taking classes within the Department of Information Studies, you should familiarize yourself with the department’s Academic Dishonesty Policy, available in both the department’s Graduate Handbook and online at [http://www.albany.edu/content_images/Academic_Dishonesty.pdf](http://www.albany.edu/content_images/Academic_Dishonesty.pdf).

It is your responsibility to complete your own work as best as you can in the time provided. Cheating (including sharing your answers with another), plagiarism, submission of the same work for two different classes, working together as a group for assignments/tests designed for individual assessment are serious offenses, and it is the instructor’s responsibility to make sure they do not occur. Anyone suspected of an academic misconduct should expect to have a record of the matter forwarded to the Committee on Academic Misconduct, in accordance with Faculty Rule. Academic misconduct will be punished to the fullest extent possible. Those who found guilty of academic misconduct by the Committee on Academic Misconduct should expect to fail the entire course.

**Communication:**
I use the Announcements, Class Email, and My Grades features to communicate with you about your progress in the course. When you log into the course, these should be the FIRST areas you check. It is your responsibility to keep up with course communication and to use the Ask a Question forum if you need assistance with the course.

**Discussions and Participation:**
A significant portion of your grade will be based on your participation in the discussion forums. As a result, we must work to understand what constitutes participation. For the most part, your posts should add to the discussion by bringing in new ideas, asking additional questions from new perspectives, or synthesizing materials. You will be graded based on original contributions and significant feedback and not simply on a count of how many posts you make. The Discussion Rubric is available for specific criteria and qualities for active discussion participation.

**Writing:**
All posts and papers for this course must be in standard English. Do not use slang or texting abbreviations (i.e., lol). To ensure that the course is easy to navigate and read, use formatting tools (text color, bold, etc) selectively. Capitalize and use complete sentences in your discussion responses and in your paper. You can use bullet lists for listing materials if it makes sense as a way to convey the information. Emoticons are acceptable as long as they are not overly used and help with communication. Do not attach files or images to posts unless they add to the conversation and cannot be summarized in a normal post. In short, use this course as an opportunity to work on written communication!

*Before submitting work, be sure to proofread your post and make sure that any links that you include are correct. You will not be able to edit your posts after hitting "submit."* I recommend you to write your post in a text program (for example, TextEdit, Notepad, and WordPad, but I don’t recommend MS-Word) and copy/paste it to the BLS.

NOTE: The instructor of this course reserves the right to remove any questionable or offensive material from public areas of this course.

**Submission of Work:**
All work for this class must be submitted as the assignment states as instructed. Discussions must be made in the appropriate forum, your literature review paper must be submitted using the SafeAssign submission tool, etc. I will not accept submission of coursework though any other method. Items that are incorrectly submitted will NOT be graded.

**Disabilities:**
Please contact me if you have a disability, so we can discuss ways to help you succeed in the course. If you need accommodations that would affect the terms of this syllabus, you will need to provide documentation of your disability.

**Syllabus as Contract:**
The course syllabus is a contract for the terms and conditions of your participation in this course. If, after reading the syllabus, you are unclear about or do not agree to the terms stated within, please speak with the instructor or withdraw yourself from the course.

**Course Schedule**

**Module 0 (1/16-1/29). Course Introduction & Ice Breaker**
Introduction to the course, syllabus overview, student introduction, student survey

**Module 1 (Week of 1/30). Introduction to Information Organization, Basic Concepts and Terminology (1)**
Required Reading:
Taylor and Joudrey, Chapter 1


Further Readings:

Module 2 (Week of 2/6). Information Representation and Surrogate Records, Bibliographic Relationship
Required Readings:
Taylor and Joudrey, Chapter 2 (39-66).

Further Readings:

Module 3 (Week of 2/13). Authority Control, Linked Data
Required Readings:
Taylor and Joudrey, Chapter 8 (245-301).

Further Readings:

Module 4 (Week of 2/20). Subject Analysis and Indexing
Assignment 1 Due (2/20)
Required Readings:
Taylor and Joudrey, Chapter 9 (303-332).

Further Readings:

Module 5 (Weeks of 2/27 & 3/6). Languages in Information Organization: Introduction to Controlled Vocabularies, Natural Language Processing, and Social Tagging
(This module will be studied in two weeks.)
Final Project Topic and Preliminary Bibliography Due (2/27)
Required Readings:
Taylor and Joudrey, Chapter 10 (333-374).

Further Readings:
Yoon, Carol Kaesuk. (2009). "One. The Strange Case of the Fish That Wasn't" and "Two. The Little Oracle." in *Naming Nature: The Clash Between Instinct and Science*. New York: Norton, pp. 3-52. (Controlled vocabularies are about categorizing, labeling the categories, and identifying relationships. This book is an interesting reading about these topics in the field of biology.)

No Module for the Week of 3/13 (Spring Break)

**Module 6 (Week of 3/20). Metadata: Information Organization for Digital Resources**
**Assignment 2 Due (3/20)**
Required Readings:
Taylor and Joudrey, Chapters 4 (89-127) & 7 (199-243).

Further Readings:

**Module 7 (Weeks of 3/27 & 4/3). Categorization and Classification**
(This module will be studied in two weeks.)
Required Readings:

Taylor and Joudrey, Chapter 11 (375-415). (Some parts are overlapped with Rowley and Hartley’s chapters. Skim through the repeating parts.)


Examples:

Further Readings:

Boroditsky, Lera. “Lost in Translation.” WSJ, 2010. (This is an interesting article to show how languages influence how we see things differently—how we determine the important matter of an event/object.)

No module for the week of 4/10 (Passover)

Module 8 (Week of 4/17) Organization of Non-textual Information
Assignment 3 Due (4/17)

Required Readings:


Interesting Projects to Review:
the “Take Notes from Nature” project).

Module 9 (Week of 4/24). Organization for Special Collections, Archives, and Museum Archival Principles, Archival Processing, Special Collection Cataloging, Museum Registration Required Readings:

Week of 5/1. Final Project Working Week. There is no module to study. I will have extended office hours for students who might need assistance for the project and video presentation.

Week of 5/8: Final Project Submission and Presentation