School of Information Management  
INFO 6330 Cataloguing & Classification  
Winter 2019

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E-mail: Louise Spiteri@dal.ca  
Office hours: Tuesdays, 10:00 am – 12:00 pm, and by appointment  
Website: Brightspace

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**COURSE DESCRIPTION**

This course addresses the theories, principles, and practices of bibliographic description, and the application of national standards to the construction of catalogues in libraries. The course covers the fundamental concepts of descriptive and subject cataloguing, including: The elements of bibliographic description, the choice of access points, the formulation of authorized headings, the principles and practices of authority work, the application of encoding standards, and the use of bibliographic classification systems. The course includes examinations of trends and future directions of bibliographic description.

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**COURSE PRE-REQUISITES**

INFO 5515 Organization of Information

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**COURSE GOALS**

This course will introduce students to the theories and applications of the design of library metadata records for print-based monographs. The course will cover essential principles and topics of descriptive cataloguing and classification, including:

1. The use of library metadata standards, such as Resource Description and Access, Library of Congress Subject Headings, Dewey Decimal Classification System, and the Library of Congress Classification System.
2. An understanding of the Functional Requirements for Bibliographic Resources (FRBR) and its impact on information retrieval and cataloguing
3. The principles of bibliographic description.
4. The principles of library classification.
5. The principles of authority control.
6. The principles of subject description.
7. User-contributed metadata in library catalogues.

**LEARNING OUTCOMES**

Upon completion of the course, students are expected to have gained basic knowledge or proficiency in the following areas, divided according to the core competencies of the MLIS program:

<table>
<thead>
<tr>
<th>Learning Outcome</th>
<th>Relevant MLIS Core Competencies</th>
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<tbody>
<tr>
<td>The role of the catalogue and cataloguing in information retrieval.</td>
<td>#1 Management of Information Technology</td>
</tr>
<tr>
<td></td>
<td>#2 Information Management Leadership</td>
</tr>
<tr>
<td></td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The ethical and values-based principles of cataloguing and classification.</td>
<td>#2 Information Management Leadership</td>
</tr>
<tr>
<td>The design of bibliographic and authority records for monographs using Resource Description and Access</td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The role of user-generated metadata in library catalogues.</td>
<td>#1 Management of Information Technology</td>
</tr>
<tr>
<td></td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The principles, structure, and application of the Library of Congress Subject Headings for subject analysis and retrieval.</td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The principles, structure, and application of the digital metadata framework Machine Readable Cataloging (MARC).</td>
<td>#1 Management of Information Technology</td>
</tr>
<tr>
<td></td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The principles of authority control, and the creation of standardized language by which to describe the names and content associated with published works</td>
<td>#2 Information Management Leadership</td>
</tr>
<tr>
<td></td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The principles, structure, and use of the Dewey Decimal Classification System and the Library of Congress Classification System.</td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>The evaluation of the effectiveness of existing metadata codes and subject analysis systems in an ever-changing information environment</td>
<td>#2 Information Management Leadership</td>
</tr>
<tr>
<td>The creation of metadata records in a collaborative work environment.</td>
<td>#4 User-centred Information Services</td>
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<tr>
<td></td>
<td>#6 Workplace Skills &amp; Attributes</td>
</tr>
</tbody>
</table>

**TECHNOLOGY USED**

- RDA Toolkit: Online version of Anglo-American Cataloging Rules
- WebDewey: Online version of the Dewey Decimal Classification System
- MARC 21: Web-based version of MARC 21 Bibliographic.
- Classification Web: Online version of the Library of Congress Classification System

The course site, hosted through Brightspace, has several functions: Storage of digital copies of the syllabus and some readings, hosting of discussion boards, and notifications of announcements, which you should monitor frequently, as not to miss important things like assignment clarifications and class cancellations.

**INSTRUCTIONAL METHODS**

Instruction will combine lecture, discussion, problem-based learning, and hands-on applications in class. Students will prepare for, and pursue, ideas presented in class through readings and exercises. Participation in supplementary discussion boards posted on the course web site is also expected.

**LEARNING MATERIALS**

**Required material**

Students will have access to the RDA Toolkit website. The School maintains a yearly basic subscription to the toolkit (one license), but students must pay for individual access to this subscription. The average cost for individual access is $50. This fee may be subject to change, depending on the number of registered students, as this will affect the concurrent user fee. The course schedule provides a list of readings per week; **those marked with an asterisk are required** and will form the basis of class questions and discussions. You are encouraged to share with the class any items of relevance to the course that you may encounter during the term.

**General resources**

(generate LC Cutter numbers, country codes, language codes, search Library of Congress authority files)

**Classification**


**MARC**


**Subject cataloguing**


**Professional blogs**

Students are encouraged to follow professional blogs that pertain to bibliographic metadata. Relevant posts from these blogs may be added to the weekly readings, as necessary, by the instructor, to highlight trends and development in library metadata:

First Thus: http://blog.jweinheimer.net/

Lorcan Dempsey’s Weblog: http://orweblog.oclc.org/

Metadata Blog: https://www.alcts.ala.org/metadatablog/

Metadata Blog: https://www.alcts.ala.org/metadatablog/

Planet Cataloging: http://planetcataloging.org/
**METHODS OF EVALUATION**

Detailed instructions regarding each assignment will be provided. Assessment of all assignments is directly related to attention to the instructions, clarity of expression and presentation, and evidence of significant analysis and reflection. See also the **SIM Grading Policy**.

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Description</th>
<th>Weight</th>
<th>MLIS Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class participation</td>
<td>Will be assigned to the student by the instructor based upon these criteria: class attendance; participation in class discussions and exercises; completion of assigned readings; adherence to stated deadlines; active participation in the class blog/discussion board. <strong>Due: Ongoing</strong></td>
<td>10%</td>
<td>#4 User-centred Information Services</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>#6 Workplace Skills &amp; Attributes</td>
</tr>
<tr>
<td>Library technology report</td>
<td>Creation of a report to explore and evaluate technological retrieval systems used in libraries. Details to follow. <strong>Due: January 21, 2019</strong></td>
<td>20%</td>
<td>#1 Management of Information Technology</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>#4 User-centred Information Services</td>
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<tr>
<td></td>
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<td></td>
<td>#5 Research and Evaluation</td>
</tr>
<tr>
<td>Creation of metadata records</td>
<td>Creation of full metadata records for selected items; evaluation and analysis of the adequacy of metadata standards to meet the needs of information retrieval. Details to follow. <strong>Due: March 4, 2019</strong></td>
<td>25%</td>
<td>#1 Information Management Leadership</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>#4 User-centred Information Services</td>
</tr>
<tr>
<td>Subject cataloguing</td>
<td>Subject analysis of selected records using LCSH; evaluation and analysis of the adequacy of LCSH to meet the needs of information retrieval. Details to follow. <strong>Due: March 18, 2019</strong></td>
<td>20%</td>
<td>#2 Information Management Leadership</td>
</tr>
<tr>
<td>Classification</td>
<td>Creation of DDC numbers for selected records; evaluation and analysis of the adequacy of DDC to meet the needs of information retrieval. Details to follow. <strong>Due: April 1, 2019</strong></td>
<td>25%</td>
<td>#4 User-centred Information Services</td>
</tr>
</tbody>
</table>
PARTICIPATION EVALUATION RUBRIC

<table>
<thead>
<tr>
<th>CRITERION</th>
<th>WEIGHTING</th>
<th>INDICATORS</th>
</tr>
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</table>
| Preparation                 | 40%       | ● The student demonstrates consistent preparation for class  
                               ● Readings are always completed and the student can relate readings to each other and to other course material (discussions, presentations, guest speakers, etc.) |
| Quality of contributions    | 40%       | ● The student’s comments are relevant and reflect an understanding of readings and other course material.  
                               ● The student’s contributions add value to the discussion. |
| Frequency of participation  | 10%       | ● The student is actively engaged in the class and/or discussions at all times.                                                          |
| Attendance/Punctuality      | 10%       | ● The student is always punctual and there are no unexcused absences.                                                                     |

CLASS POLICIES

Civility
In this course, a strong emphasis is placed on civility, which comprises a conscious demonstration of mutual respect – for people, their roles, knowledge, and expertise. Civility requires cooperation, tolerance, acceptance, inclusiveness, kindness, courtesy, and patience. It is expressed not only in the words we choose, but in our tone, demeanour, and actions. The instructor, students, and guests, are responsible for, and expected to, exemplify and promote civility. While it is understood that disagreement will, and should, occur in a collegiate setting, open communication, intellectual integrity, mutual respect for differing viewpoints, freedom from unnecessary disruption, and a climate of civility are important values that we embrace. Examples of civility include:
- Respect and courtesy in language, demeanour, and actions;
- Respectful acknowledgement of individual differences;
- Empathy and patience; and
- Refraining from insulting, disrespectful, dismissive, or humiliating language or actions

Attendance
Class attendance is required in all MLIS courses and is included in the participation mark. Attendance records will be kept by the instructor.

Absence from class (one class)
Students are required to inform the instructor ahead of time of any absence from class. This absence may affect participation marks or class activities.
Absence from class (extended)

- Emergencies
  Contact the MLIS Program Coordinator and provide a list of the courses you are taking and your instructors’ names.

- Illness
  Contact your instructor(s) as soon as possible prior to class to inform them of your illness.
  All absences due to illness must be supported by a physician’s note to be submitted to the MLIS Program Coordinator (JoAnn Watson) with a list of courses you are taking and your instructors’ names.

Citation Style
SIM courses use APA as the default standard citation style. Unless the instructor provides alternative written instructions, please use the APA citation style in your assignments to briefly identify (cite) other people’s ideas and information and to indicate the sources of these citations in the References list at the end of the assignment. For more information on APA style, consult Dalhousie Library website at https://libraries.dal.ca/help/style-guides.html or the APA’s Frequently Asked Questions about APA.

Late penalties for assignments
A penalty for late assignments will be assessed, unless prior permission has been given by the instructor to submit an assignment late, which normally will be for extended illness, medical, or family emergencies only (see above). Late submissions will be assessed a penalty of five percent per day, including weekends. Assignments will not normally be accepted seven days or more after the due date; in such cases the student will receive a grade of zero.

Assignment Format
Please ensure that all assignments adhere to the format requirements below. All assignments must:
  - be double spaced
  - use 12-point font in either Arial (preferred) or Times New Roman
  - be in Word. Please do NOT use PDF.
  - be submitted as attached files via Brightspace and labelled as follows: Surname_INFO64000Assig01
  - contain your name
  - adhere to the required citation format for this course, which is the Publication manual of the American Psychological Association, which is available at http://owl.english.purdue.edu/owl/resource/560/01/. The readings in the syllabus are cited in APA format, so please use them as a guide.
  - be submitted by no later than 17:00 on the day they are due.

Grades are assigned in accordance with the School of Information Management's grading policy:

<table>
<thead>
<tr>
<th>Letter value</th>
<th>Numeric value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>90-100</td>
<td>Demonstrates original work of distinction.</td>
</tr>
<tr>
<td>A</td>
<td>85-89</td>
<td>Demonstrates high-level command of the subject matter and an ability for critical analysis.</td>
</tr>
<tr>
<td>A-</td>
<td>80-84</td>
<td>Demonstrates above-average command of the subject matter.</td>
</tr>
<tr>
<td>B+</td>
<td>77-79</td>
<td>Demonstrates average command of the subject matter.</td>
</tr>
<tr>
<td>B</td>
<td>73-76</td>
<td>Demonstrates acceptable command of the subject matter.</td>
</tr>
<tr>
<td>B-</td>
<td>70-72</td>
<td>Demonstrates minimally acceptable command of the subject matter.</td>
</tr>
<tr>
<td>F</td>
<td>&lt;70</td>
<td>Unacceptable for credit towards a Master’s degree.</td>
</tr>
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**ACCOMMODATION POLICY FOR STUDENTS**

Students may request accommodation as a result of barriers experienced related to disability, religious obligation, or any characteristic protected under Canadian human rights legislation.

Students who require academic accommodation for either classroom participation or the writing of tests and exams should make their request to the Advising and Access Services Center (AASC) prior to or at the outset of the regular academic year. Please visit [www.dal.ca/access](http://www.dal.ca/access) for more information and to obtain the Request for Accommodation form.

A note taker may be required as part of a student’s accommodation. There is an honorarium of $75/course/term (with some exceptions). If you are interested, please contact AASC at 494-2836 for more information or send an email to notetaking@dal.ca.

Please note that your classroom may contain specialized accessible furniture and equipment. It is important that these items remain in the classroom, untouched, so that students who require their usage are able to fully participate in the class.

**ACADEMIC INTEGRITY**

In general:

The commitment of the Faculty of Management is to graduate future leaders of business, government and civil society who manage with integrity and get things done. This is non-negotiable in our community and it starts with your first class at Dalhousie University. So, when you submit any work for evaluation in this course or any other, please ensure that you are familiar with your obligations under the Faculty of Management’s Academic Integrity Policies and that you understand where to go for help and advice in living up to our standards. You should be familiar with the Faculty of Management Professor and Student Contract on Academic Integrity, and it is your responsibility to ask questions if there is anything you do not understand.
Dalhousie offers many ways to learn about academic writing and presentations so that all members of the University community may acknowledge the intellectual property of others. Knowing how to find, evaluate, select, synthesize and cite information for use in assignments is called being “information literate.” Information literacy is taught by Dalhousie University Librarians in classes and through Dalhousie Libraries’ online Citing & Writing tutorials.

Do not plagiarize any materials for this course. For further guidance on what constitutes plagiarism, how to avoid it, and proper methods for attributing sources, please consult the University Secretariat’s Academic Integrity page.

Please note that Dalhousie subscribes to plagiarism detection software that checks for originality in submitted papers. Any paper submitted by a student at Dalhousie University may be checked for originality to confirm that the student has not plagiarized from other sources. Plagiarism is considered a very serious academic offence that may lead to loss of credit, suspension or expulsion from the University, or even the revocation of a degree. It is essential that there be correct attribution of authorities from which facts and opinions have been derived. At Dalhousie, there are University Regulations which deal with plagiarism and, prior to submitting any paper in a course; students should read the Policy on Intellectual Honesty contained in the Calendar.

Furthermore, the University’s Senate has affirmed the right of any instructor to require that student assignments be submitted in both written and computer readable format, e.g.: a text file or as an email attachment, and to submit any paper to a check such as that performed by the plagiarism detection software. As a student in this class, you are to keep an electronic copy of any paper you submit, and the course instructor may require you to submit that electronic copy on demand. Use of third-party originality checking software does not preclude instructor use of alternate means to identify lapses in originality and attribution. The result of such assessment may be used as evidence in any disciplinary action taken by the Senate.

Finally:
If you suspect cheating by colleagues or lapses in standards by a professor, you may use the confidential email: ManagementIntegrity@dal.ca which is read only by the Assistant Academic Integrity Officer.

Faculty of Management clarification on plagiarism versus collaboration:
There are many forms of plagiarism, for instance, copying on exams and assignments. There is a clear line between group work on assignments when explicitly authorised by the professor and copying solutions from others. It is permissible to work on assignments with your friends but only when the professor gives you permission in the specific context of the assignment. University rules clearly stipulate that all assignments should be undertaken individually unless specifically authorised.

Specific examples of plagiarism include, but are not limited to, the following:
- Copying a computer file from another student, and using it as a template for your own solution
- Copying text written by another student
- Submitting the work of someone else, including that of a tutor as your own

An example of acceptable collaboration includes the following:
- When authorised by the professor, discussing the issues and underlying factors of a case with fellow students, and then each of the students writing up their submissions individually, from start to finish.

UNIVERSITY STATEMENTS

ACCESSIBILITY
The Advising and Access Centre (http://bit.ly/2ljSgf) serves as Dalhousie’s Centre for expertise on student accessibility and accommodation. Our work is governed by Dalhousie’s Student Accommodation Policy, to best support the needs of Dalhousie students. Our teams work with students who request accommodation as a result of: disability, religious obligation, an experienced barrier related to any other characteristic protected under Canadian Human Rights legislation.

STUDENT CODE OF CONDUCT
Everyone at Dalhousie is expected to treat others with dignity and respect. The Code of Student Conduct (http://bit.ly/2lkIYfc) allows Dalhousie to take disciplinary action if students don’t follow this community expectation. When appropriate, violations of the code can be resolved in a reasonable and informal manner—perhaps through a restorative justice process. If an informal resolution can’t be reached, or would be inappropriate, procedures exist for formal dispute resolution.

DIVERSITY AND INCLUSION
Every person at Dalhousie has a right to be respected and safe. We believe inclusiveness is fundamental to education. We stand for equality (http://bit.ly/2rLdc0w).

Dalhousie is strengthened in our diversity. We are a respectful and inclusive community. We are committed to being a place where everyone feels welcome and supported, which is why our Strategic Direction prioritizes fostering a culture of diversity and inclusiveness (Strategic Priority 5.2).
RECOGNITION OF MI’KMAQ TERRITORY
Dalhousie University would like to acknowledge that the University is on Traditional Mi’kmaq Territory ([http://bit.ly/2rNBVRN](http://bit.ly/2rNBVRN)).

The Elders in Residence program provides students with access to First Nations elders for guidance, counsel and support. Visit the office in the McCain Building (room 3037) or contact the programs at elders@dal.ca or 902-494-6803 (leave a message)
## COURSE SCHEDULE

<table>
<thead>
<tr>
<th>Week</th>
<th>Topics</th>
<th>Readings</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan. 21, 2019</td>
<td>The ethics of cataloguing</td>
<td>*RDA Toolkit, Chapters 0-2</td>
</tr>
<tr>
<td>Jan. 28, 2019</td>
<td>User-contributed metadata</td>
<td>*RDA Toolkit, Chapters 2-4</td>
</tr>
</tbody>
</table>
**Manifestations & items, part 2**


**Feb. 4, 2019**

Recording attributes of works and expressions

*RDA Toolkit, Chapters 5-7*

**Feb. 11, 2019**

- Recording attributes of agents
- Authority work

*RDA Toolkit, Chapters 8-11


February 18-22, 2019: Winter study break. No classes

**Feb. 15 & March 4, 2019**

- Subject cataloguing
- Library of Congress Subject Headings
- Canadian Subject Headings
- OCLC Connexion
- Subject authority files


Assignment 2 is due on March 4.
<table>
<thead>
<tr>
<th>Date</th>
<th>MARC Coding Assignment</th>
<th>Notes</th>
</tr>
</thead>
</table>
|                  |                        | *Library of Congress. (2009). What is a MARC record and why is it important? Retrieved from [https://www.loc.gov/marc/umb/um01to06.html](https://www.loc.gov/marc/umb/um01to06.html)