We acknowledge that we are on the traditional, ancestral and unceded territory of the ̏ənq̓əəm̓ən̓ 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.

<table>
<thead>
<tr>
<th>LIBR 514E: Taxonomies: Research and Evaluation– Course Syllabus (3)</th>
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<tbody>
<tr>
<td><strong>Program:</strong> Master of Library and Information Studies</td>
</tr>
<tr>
<td><strong>Year:</strong> 2018-2019 Winter Session, term 1</td>
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<tr>
<td><strong>Course Schedule:</strong> Mondays, 6:00 to 8:50 PM</td>
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<tr>
<td><strong>Location:</strong></td>
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<tr>
<td><strong>Instructor:</strong> Aaron Loehrlein</td>
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<tr>
<td><strong>Office location:</strong> iSchool Adjunct Office</td>
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<tr>
<td><strong>Office phone:</strong></td>
</tr>
<tr>
<td><strong>Office hours:</strong></td>
</tr>
<tr>
<td><strong>E-mail address:</strong> <a href="mailto:a.loe@ubc.ca">a.loe@ubc.ca</a></td>
</tr>
<tr>
<td><strong>Learning Management Site:</strong> canvas.ubc.ca</td>
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</table>

**Course Goal:** The primary focus of this course is taxonomies and how they are used. It builds on skills and techniques you learned in courses in the LIBR core. Taxonomies are hierarchical arrangements of concepts. They are used in a wide variety of information systems, including library catalogs, popular websites, e-commerce sites, medical and scientific databases, and repositories of music and art. While it is important that information professionals use taxonomies correctly, it is even more important to understand how non-professionals use taxonomies. By doing so, we can see what users expect from taxonomies and which types of taxonomic structures people are most comfortable with. This course considers two major aspects of taxonomies. The first aspect concerns usability studies for taxonomies. The second aspect concerns the theories and philosophies that form the basis of high quality taxonomies. In professional practice, the evaluation of taxonomies is often not approached systematically. This course will explore methods for evaluation that are widely used, as well as methods that are less well known.

**Course Objectives:**

Upon completion of this course students will be able to:

1. Describe and interpret current issues regarding the creation and use of taxonomies [1.2, 3.1, 4.1]
2. Evaluate taxonomies as tools for organizing information [1.2, 4.1]
3. Design and revise taxonomies to address the social and cognitive issues that people encounter when searching for information [1.2, 2.2, 3.1]

**Course Topics:**

- Hierarchical structure and labeling
Navigating taxonomies
Making inferences based on taxonomic structure
Qualitative and quantitative theories that model the design and use of taxonomies
Philosophical assumptions underlying taxonomies
Studies of specific taxonomies
Studies involving general types of taxonomies

Prerequisites:
MLIS and Dual MAS/MLIS: Completion of MLIS Core or permission of the iSchool Graduate Advisor
MAS: completion of MAS core and permission of the iSchool Graduate Advisor

Format of the course: Class meets on Monday evenings. Class sessions will be primarily discussions, some of which will be led by students. Some class sessions will also include lectures by the instructor.

Required and Recommended Reading: Provided online, via Canvas, or via UBC Libraries

Tentative reading list:


• Nisbett, R. E. (2003). Is the world made up of nouns or verbs? In The Geography of Thought (pp. 137-164). New York: Free Press. (Canvas)
• OptimalSort demo: http://www.optimalworkshop.com/optimalsort.htm


Course Assignments

<table>
<thead>
<tr>
<th>Assignment Name</th>
<th>Due Date</th>
<th>Weight</th>
<th>Graduate Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briefing Paper</td>
<td>Oct 15</td>
<td>10%</td>
<td>1.2</td>
</tr>
<tr>
<td>Critique of Taxonomy</td>
<td>Dec 3</td>
<td>40%</td>
<td>1.2, 2.2, 4.1</td>
</tr>
<tr>
<td>Leading Discussion</td>
<td>Varies by student</td>
<td>25%</td>
<td>3.1, 4.1</td>
</tr>
<tr>
<td>Class participation and attendance</td>
<td>Throughout the term</td>
<td>25%</td>
<td>2.2, 3.1</td>
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Assignment Descriptions

**Leading a Class Discussion** – students will plan and manage a class discussion session of their choosing (approximately 20-30 minutes). Students will prepare supplemental readings, class activities, and discussion questions for the class, coordinated in advance with the instructor. Discussion topic selection will occur at our second class meeting.

**Taxonomy Briefing** – Students will select an existing taxonomy. They will write a short paper (approximately 1,000-1,500 words) that describes the function and form of the taxonomy. This paper will be due on October 16. The taxonomy that is chosen should meet these criteria:

- The taxonomy has a user base. That is, there are people who actually use it. Taxonomies that are created as course projects often do not fit this criterion.
• The taxonomy should consist of:
  o Nodes/Headings/Terms
  o Relationships (nested relationships are okay)
  o There should be a set of items that is organized by the taxonomy, even if it is just “sample” items.
• The taxonomy should be large enough to provide the basis for a meaningful description. At a minimum, the taxonomy should contain at least 50 nodes. However, the taxonomy should not be so large as to be overwhelming and impossible to analyze. For example, the Medical Subject Headings (MeSH) taxonomy has approximately 25,000 headings. If you choose to describe MeSH, or another large taxonomy, you should describe the taxonomy at a high, general level.
• It does not matter if the taxonomy is formally referred to as a “taxonomy.” Many taxonomies are referred to as thesauri, subject heading systems, classification schemes, etc. As long as it fits the criteria above, the particular name given the taxonomy is not an issue.
• Write a brief description of the taxonomy (approximately 1,000-1,500 words). The description should cover these points, but is not limited to these points:
  o The name of the taxonomy
  o The conceptual domain of the taxonomy. That is, what concepts in general are covered by the taxonomy. Your description should what you feel are the major concepts in the taxonomy. Also, if applicable, provide a few illustrative examples of topics that the taxonomy covers in less detail. Feel free to use your own intuitions in identifying the concepts covered by the taxonomy.
  o The person or organization who maintains the taxonomy
  o The people, or types of a people (e.g., a profession) for whom the taxonomy has been designed.
  o The typical use or uses of the taxonomy. For example, it may be used to organize and provide access to a set of documents. If so, briefly describe the documents, who is likely to use them, and what they are likely to use them for.
  o Also, describe your initial impression of the taxonomy. Does it seem to be useful? Are there any features of the taxonomy that are a cause for concern?

Revised Taxonomy – Working separately or in groups, students will propose a revision to the taxonomy that they have selected. The students should select a particular section of the taxonomy and redesign it, so that it can better meet the use to which it is put. Alternately, the student may focus on one or more aspects of the taxonomy (users, relationship types, etc.) and propose revisions to that aspect. Additional details regarding this assignment will be provided later in the semester. Students will informally present and discuss their proposals in the last session of class.

Course Schedule [week-by-week]:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Date</th>
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<tbody>
<tr>
<td>Week 1</td>
<td></td>
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<tr>
<td>Introduction and course expectations</td>
<td>Sep 10</td>
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<tr>
<td>Week 2</td>
<td></td>
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<tr>
<td>Foundations and Taxonomic Structures</td>
<td>Sep 17</td>
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<tr>
<td>• Lambe, P. (2007) (Canvas)</td>
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<tr>
<td>o Defining our terms (pp. 1-12)</td>
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<tr>
<td>o Taxonomies can take many forms (pp. 13-48)</td>
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<tr>
<td>• Hedden, H. (2011) (Canvas)</td>
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<tr>
<td>Week</td>
<td>Topic</td>
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</table>
• Furner (2007) (Canvas) | Sep 24 |
| 6    | Taxonomies in Health Care | • Bowker and Star (2000) (Canvas)  
  o The Kindness of Strangers (pp. 53-106)  
  o ICD as Information Infrastructure (pp. 107-134) | Oct 1 |
|      | No Class: Thanksgiving Day |  | Oct 8 |
| 7    | Culture and Conception | • Henrich et al (2010) (UBC Libraries)  
  Note: Only the first 23 pages are required  
| 8    | Conceptual Theories and Grounding | • Jacob (2002) (Canvas)  
• Hjørland (2009) (UBC Libraries)  
• Szostak (2011) (UBC Libraries)  
| 10   | Navigation | • Whitenton (2013) (online)  
• Kim, Jacko, & Salvendy (2011) (UBC Libraries) | Oct 29 |
| 11   | Card Sorting | • Righi et al (2013) (online)  
• Turnbow et al (2005) (UBC Libraries)  
• OptimalSort demo | Nov 5 |
<table>
<thead>
<tr>
<th>No class: Remembrance Day</th>
<th>Nov 12</th>
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<tbody>
<tr>
<td>Week 12</td>
<td>Nov 19</td>
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<tr>
<td>Taxonomies and Folksonomies</td>
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<tr>
<td>• Keshet (2011) (UBC Libraries)</td>
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<tr>
<td>• Reamy (2010) (online)</td>
<td></td>
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<tr>
<td>• Rorissa &amp; Iyer (2008) (UBC Libraries)</td>
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<tr>
<td>Week 13</td>
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<tr>
<td>Presentations</td>
<td>Nov 26</td>
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**Attendance:** Excessive absences may result in lower marks for class participation.

**Evaluation:** All assignments will be marked using the evaluative criteria given on the [iSchool web site](http://www.ischool.ubc.ca). **Evaluation:** All assignments will be marked using the evaluative criteria given on the [iSchool web site](http://www.ischool.ubc.ca). **Evaluation:** All assignments will be marked using the evaluative criteria given on the [iSchool web site](http://www.ischool.ubc.ca).

**Access & Diversity:** Access & Diversity 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 Access and Diversity unit: [https://students.ubc.ca/about-student-services/access-diversity](https://students.ubc.ca/about-student-services/access-diversity). 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/](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](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/](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.