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# INFS 462: SUBJECT CATALOGING AND CLASSIFICATION

Spring 2010

<b>Syllabus</b>
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Version 1.0—April 1, 2010
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## Course information

Number: INFS 462  
Title: Subject Cataloging and Classification  
ID: 628-724-200  
Quarter: spring 2010  
Location: Room 111, GSE&IS Building  
Time: Thursday, 9am–12:30pm

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## Instructor information

Instructor: Jonathan Furner  
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Office hours: Monday, 11am–2pm

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## Catalog description

“462. *Subject Cataloging and Classification*. (4) Lecture/discussion, four hours. Prerequisite: course 461. Overview of major alphabetic-subject and systematic indexing languages and their use in manual and online environments, including theory and application of Library of Congress subject headings and of Dewey decimal and Library of Congress classifications. S/U or letter grading.”

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## Objectives

The aim of this introductory course is to prepare students for professional practice in the **design, application, evaluation, and use of subject languages**—artificial languages in which descriptions of the subjects of information resources may be expressed by catalogers, classifiers, or indexers, and descriptions of the subjects of information needs expressed by information seekers.

The aim of the course will be met through achievement of the following objectives:

- to develop students' knowledge (i) of the **variety and functionality** of existing subject languages, and (ii) of the **semantic and syntactic structures** embodied in such systems;
- to develop students' understanding of **theories and models** of subject classification, and of the **principles** of subject-language design and construction;
- to develop students' skills (i) in the **selection and application** of subject languages that allow information needs to be satisfied effectively and efficiently in specific contexts, and (ii) in the

**critical analysis and evaluation** of the quality of subject languages and the performance of catalogers, classifiers, and indexers.

Officially, there is a pre-requisite for this course: IS 461 Descriptive Cataloging. But I routinely waive this requirement on petition.

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## Outcomes

Upon satisfactory completion of this course, you will be able to:

- make confident and successful use, in subject specification, of a wide range of subject languages;
- conduct critical analyses of subject-language quality and subject-cataloger performance;
- appreciate, and communicate to others, the needs and preferences of funders, search system designers, subject language designers, catalogers/classifiers/indexers, and searchers;
- contribute to institutional decision-making on the basis of informed assessment of the subject-cataloging techniques that are most appropriate for application in individual contexts; and
- participate actively in debate on current challenges facing professionals in the field of subject cataloging and classification.

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## Methods

Each week the instructor will give a lecture and lead classroom discussion, supported by PowerPoint slides, handouts, and online demonstrations. The sets of slides and handouts will be available from the course website, accessible through UCLA's **Common Collaboration and Learning Environment** (CCLE).

To access the course website, go to <http://cclle.ucla.edu/>, click on "Spring 10" under "Education and Information Studies," then click on page "8," then click on "2010 Spring INF STD462 LEC1 (FURNER)," then click on "Login," then enter your UCLA Logon ID and Password (i.e., your Bruin Online ID, *not* your GSE&IS ID), and click on "Sign In."

Readings are set for each week. It's important that everyone comes to class well prepared, ready to discuss the week's required readings. There are two reading lists (see below): a "List of required readings," and a "Supplementary list of recommended readings." Most of the required readings will be available from the course website, accessible through CCLE (UCLA's Common Collaboration and Learning Environment). Copies of any required readings that aren't available online will be put on reserve in the MIT Lab (GSE&IS Building, 1st floor).

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## Textbooks

There is one required and two recommended texts for this course. The **required** text (available from LuValle Commons, priced at \$60 new or \$45 used, or from Amazon.com, priced at \$47 new or \$30 used) is:

- Chan, Lois Mai. 2007. *Cataloging and classification: An introduction*. 3rd ed. Lanham, MD: Scarecrow.

The **recommended** texts are:

- Svenonius, Elaine. 2000. *The intellectual foundation of information organization*. Cambridge, MA: MIT Press.
- Wilson, Patrick. 1968. *Two kinds of power: An essay on bibliographical control*. Berkeley, CA: University of California Press.

The book by Svenonius is available from Amazon.com, priced at \$24 new or \$5 used. The book by Wilson is out of print, but it is the Best. Book. Ever. If you're lucky you might find it on Bookfinder.com or somewhere like that.

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## Assignments

There will be six assignments in all—four weekly practical exercises (set in Weeks 2, 3, 4, and 5); a group presentation (to be presented in Week 10); plus a major paper due for submission at the end of the quarter—as follows:

1. an exercise in which you identify, and annotate the content of, the subject-related fields in a small set of self-selected MARC records (counting towards **5%** of the final grade; due in week **3**—Thursday, April 15, 9am);
2. a quiz in which you construct Library of Congress subject headings for resources on given subjects (**15%**; week **4**—Thursday, April 22, 9am);
3. a quiz in which you construct Dewey Decimal Classification numbers for resources on given subjects (**10%**; week **5**—Thursday, April 29, 9am);
4. a quiz in which you construct Library of Congress Classification numbers for resources on given subjects (**10%**; week **6**—Thursday, May 6, 9am);
5. a group project in which you prepare and give an in-class presentation on a subject language of your choice (**20%**; week **10**—Thursday, June 3);
6. a final paper on an issue in subject cataloging, indexing, and/or classification (**40%**; week **11**—**Monday**, June 7, 9am). If you obtain a grade B or higher in this class, this paper will count as the “major/specialization paper” specified on p. 35 of the IS *Student handbook 2009-2010* as a required component of the portfolio.

Full details of all the assignments will be made available in class, and then from the course website. Suggested solutions to the quizzes will be given out in class after the due dates.

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## Syllabus

<i>Week</i>	<i>Date</i>	<i>Topic</i>	<i>Required readings</i>
1	Thursday, Apr 1	Resource description and access. Information retrieval and the vocabulary problem.	Chan (2007a). Chan (2007b). LC Working Group (2008). Calhoun et al. (2009). Furrie (2009). Lancaster (2003).
2	Thursday, Apr 8	Subject languages and vocabulary control. Subject analysis.	Chan (2007c). Dextre Clarke (2010). Svenonius (1990). Wilson (1968). Langridge (1989).
3	Thursday, Apr 15	LCSH. FAST.	Chan (2007d). Cutter (1904). Drabenstott et al. (1999). Svenonius (2000). Chan (2007e).
		<b>Assignment #1 due.</b>	

4	Thursday, Apr 22 <b>Assignment #2 due.</b>	Classification. DDC.	Lakoff (1987). Bowker & Star (1999). Chan (2007f). Broughton (2006). Chan (2007g). Mitchell et al. (2003).
5	Thursday, Apr 29 <b>Assignment #3 due.</b>	DDC, cont'd. LCC.	Vizine-Goetz (2006). Weinberger (2007). Fister (2009). Chan (2007h).
6	Thursday, May 6 <b>Assignment #4 due.</b>	UDC. Thesauri.	McIlwaine (2010). BSI (1999). Slavic (2008). NISO (2005). Soergel (1995).
7	Thursday, May 13	Subject access to audiovisual resources. Automatic indexing and classification.	Layne (2002). Baca et al. (2006). Anderson & Pérez-Carballo (2001). Mann (2005). Klavans et al. (2009).
8	Thursday, May 20	Folksonomies and tagging.	Macgregor & McCulloch (2006). Furner (2009). Trant (2009). Mendes et al. (2009). Heymann et al. (2010).
9	Thursday, May 27	Ethical aspects of subject access.	Olson & Schlegl (1999). Olson (2001). Beghtol (2005). Knowlton (2005). Furner (2007).
10	Thursday, Jun 3 <b>Assignment #5 due.</b>	Classif-o-rama!	Perec (1997a). Perec (1997b).
11	Thursday, Jun 10 <b>Assignment #6 due on Monday, Jun 7, 9am.</b>	Finals week: NO CLASS.	—

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## List of required readings

### **Week 1: (a) Resource description and access.**

Chan, Lois Mai. 2007. Information resource management: Description, access, organization. In *Cataloging and classification: An introduction*, 3rd ed., pp. 3–41 (Chapter 1). Lanham, MD: Scarecrow.

Chan, Lois Mai. 2007. Foundations, principles, and standards of resource description. In *Cataloging and classification: An introduction*, 3rd ed., pp. 47–63 (Chapter 2). Lanham, MD: Scarecrow.

Library of Congress Working Group on the Future of Bibliographic Control. 2008. *On the record: Report of the Library of Congress Working Group on the Future of Bibliographic Control*. Washington, DC: Library of Congress. Available online at: <http://www.loc.gov/bibliographic-future/news/lcwg-ontherecord-jan08-final.pdf>

Calhoun, Karen, et al. 2009. *Online catalogs: What users and libraries want: An OCLC report*. Dublin, OH: OCLC Online Computer Library Center. Available online at: <http://www.oclc.org/reports/onlinecatalogs/fullreport.pdf>

Furrie, Betty. 2009. *Understanding MARC Bibliographic: Machine-readable cataloging*. 8th ed. Washington, DC: Library of Congress, Cataloging Distribution Service. Available online at: <http://www.loc.gov/marc/umb>

### **(b) Information retrieval and the vocabulary problem.**

Lancaster, F. W. 2003. Introduction; Indexing principles; Indexing practice; Quality of indexing. In *Indexing and abstracting in theory and practice*, 3rd ed., pp. 1–5; 6–23; 24–49; 83–99 (Chapters 1, 2, 3, 6). London: Facet.

### **Week 2: (a) Subject languages and vocabulary control**

Chan, Lois Mai. 2007. Principles of controlled vocabularies and subject analysis. In *Cataloging and classification: An introduction*, 3rd ed., pp. 195–212 (Chapter 7). Lanham, MD: Scarecrow.

Dextre Clarke, Stella G. 2010. Knowledge organization system standards. In *Encyclopedia of library and information sciences*, 3rd ed., ed. Marcia J. Bates and Mary Niles Maack, pp. 3176–3183. Boca Raton, FL: CRC Press.

Svenonius, Elaine. 1990. Design of controlled vocabularies. In *Encyclopedia of Library and Information Science*, vol. 45, supp. 10, pp. 82–109. New York: Dekker.

### **(b) Subject analysis.**

Wilson, Patrick. 1968. Subjects and the sense of position. In *Two kinds of power: An essay on bibliographical control*, pp. 69–92 (Chapter 5). Berkeley, CA: University of California Press.

Langridge, D. W. 1989. Definition and aims. In *Subject analysis: Principles and procedures*, pp. 1–14 (Chapter 1). London: Bowker-Saur.

### **Week 3: (a) LCSH.**

Chan, Lois Mai. 2007. Library of Congress Subject Headings. In *Cataloging and classification: An introduction*, 3rd ed., pp. 213–257 (Chapter 8). Lanham, MD: Scarecrow.

Cutter, Charles A. 1904. Subjects. In *Rules for a dictionary catalog*, 4th ed., pp. 66–80. Washington, DC: Government Printing Office.

Drabenstott, Karen M., Schelle Simcox, and Eileen G. Fenton. 1999. End-user understanding of subject headings in library catalogs. *Library Resources & Technical Services* 43, no. 3: 140–160.

Svenonius, Elaine. 2000. LCSH: Semantics, syntax and specificity. *Cataloging & Classification Quarterly* 29, 1/2: 17–30.

**(b) FAST.**

Chan, Lois Mai. 2007. FAST (Faceted Application of Subject Terminology). In *Cataloging and classification: An introduction*, 3rd ed., pp. 258–267 (Chapter 9). Lanham, MD: Scarecrow.

**Week 4: (a) Classification.**

Lakoff, George. 1987. The importance of categorization. In *Women, fire, and dangerous things: What categories reveal about the mind*, pp. 5–11 (Chapter 1). Chicago: University of Chicago Press.

Bowker, Geoffrey C., and Susan Leigh Star. 1999. Introduction: To classify is human. In *Sorting things out: Classification and its consequences*, pp. 1–32. Cambridge, MA: MIT Press.

Chan, Lois Mai. 2007. Classification and categorization. In *Cataloging and classification: An introduction*, 3rd ed., pp. 309–319 (Chapter 12). Lanham, MD: Scarecrow.

Broughton, Vanda. 2006. The need for a faceted classification as the basis of all methods of information retrieval. *Aslib Proceedings* 58, no. 1/2: 49–72.

**(b) DDC.**

Chan, Lois Mai. 2007. Dewey Decimal Classification. In *Cataloging and classification: An introduction*, 3rd ed., pp. 320–374 (Chapter 13). Lanham, MD: Scarecrow.

Mitchell, Joan S., et al. 2003. Introduction to the Dewey Decimal Classification. In *Dewey Decimal Classification and Relative Index*, 22nd ed., ed. Joan S. Mitchell, Julianne Beall, Giles Martin, Winton E. Matthews, Jr., and Gregory R. New, vol. 1, pp. xxxvii–lxxvii. Dublin, OH: OCLC Online Computer Library Center.

**Week 5: (a) DDC, cont'd.**

Vizine-Goetz, Diane. 2006. DeweyBrowser. *Cataloging & Classification Quarterly* 42, no. 3/4: 213–220.

Weinberger, David. 2007. The geography of knowledge. In *Everything is miscellaneous: The power of the new digital disorder*, pp. 46–63.

Fister, Barbara. 2009. The Dewey dilemma: In the search for better browsability, librarians are putting Dewey in a different class. *Library Journal* (October 1, 2009). Available online at: <http://www.libraryjournal.com/article/CA6698264.html>

**(b) LCC.**

Chan, Lois Mai. 2007. Library of Congress Classification. In *Cataloging and classification: An introduction*, 3rd ed., pp. 375–409 (Chapter 14). Lanham, MD: Scarecrow.

**Week 6: (a) UDC.**

McIlwaine, Ia C. 2010. Universal Decimal Classification (UDC). In *Encyclopedia of library and information sciences*, 3rd ed., ed. Marcia J. Bates and Mary Niles Maack, pp. 5432–5439. Boca Raton, FL: CRC Press.

BSI Committee IDT/3. 1999. Introduction. In *PD 1000:1999: Universal Decimal Classification: Pocket edition*, pp. 5–21. London: British Standards Institution.

Slavic, Aida. 2008. Use of the Universal Decimal Classification: A world-wide survey. *Journal of Documentation* 64, no. 2: 211–228.

**(b) Thesauri.**

National Information Standards Organization. 2005. *Guidelines for the construction, format, and management of monolingual controlled vocabularies*. ANSI/NISO Z39.19-2005. Bethesda, MD: NISO Press. Available online: search Google for “z39-19-2005.pdf”

Soergel, Dagobert. 1995. The Art and Architecture Thesaurus (AAT): A critical appraisal. *Visual Resources* 10: 369-400.

**Week 7: (a) Subject access to audiovisual resources.**

Layne, Sara Shatford. 2002. Subject access to art images. In *Introduction to art image access: Issues, tools, standards, strategies*, ed. Murtha Baca, 1–19. Los Angeles, CA: Getty Research Institute. Available online at: [http://www.getty.edu/research/conducting\\_research/standards/intro\\_aia/layne.pdf](http://www.getty.edu/research/conducting_research/standards/intro_aia/layne.pdf)

Baca, Murtha, Patricia Harpring, Elisa Lanzi, Linda McRae, and Ann Whiteside. 2006. Subject. In *Cataloging cultural objects: A guide to describing cultural works and their images*, 207–234. Chicago, IL: American Library Association.

**(b) Automatic indexing and classification.**

Anderson, James D., and José Pérez-Carballo. 2001. The nature of indexing: How humans and machines analyze messages and texts for retrieval: Part II: Machine indexing, and the allocation of human versus machine effort. *Information Processing & Management* 37, no. 2: 255–277.

Mann, Thomas. 2005. *Will Google's keyword searching eliminate the need for LC cataloging and classification?* Library of Congress Professional Guild. Available online at: <http://www.guild2910.org/searching.htm>

Klavans, Judith L., Carolyn Sheffield, Eileen Abels, Jimmy Lin, Rebecca Passonneau, Tandeep Sidhu, and Dagobert Soergel. 2009. Computational linguistics for metadata building (CLiMB): Using text mining for the automatic identification, categorization, and disambiguation of subject terms for image metadata. *Multimedia Tools and Applications* 42, no. 1: 115–138.

**Week 8: Folksonomies and tagging.**

Macgregor, George, and Emma McCulloch. 2006. Collaborative tagging as a knowledge organisation and discovery tool. *Library Review* 55, no. 5: 291–300.

Furner, Jonathan. 2009. Folksonomies. In *Encyclopedia of library and information sciences*, 3rd ed., ed. Marcia J. Bates and Mary Niles Maack, pp. 1858–1866. Boca Raton, FL: CRC Press.

Trant, Jennifer. 2009. Studying social tagging and folksonomy: A review and framework. *Journal of Digital Information* 10, no. 1. Available online at: <http://journals.tdl.org/jodi/article/view/269/278>

Mendes, Luiz H., Jennie Quiñonez-Skinner, and Danielle Skaggs. 2009. Subjecting the catalog to tagging. *Library Hi Tech* 27, no. 1: 30–41.

Heymann, Paul, Andreas Paepcke, and Hector Garcia-Molina. 2010. Tagging human knowledge. In *WSDM '10: Proceedings of the 3rd ACM International Conference on Web Search and Data Mining* (New York, NY, February 4–6, 2010).

**Week 9: Ethical aspects of subject access.**

Olson, Hope A., and Rose Schlegl. 1999. Bias in subject access standards: A content analysis of the critical literature. Available online at: <http://www.sois.uwm.edu/marginal/>

Olson, Hope A. 2001. Sameness and difference: A cultural foundation of classification. *Library Resources & Technical Services* 45: 115–122.

Beghtol, Clare. 2005. Ethical decision-making for knowledge representation and organization systems for global use. *Journal of the American Society for Information Science and Technology* 56, no. 9: 903–912.

Knowlton, Steven A. 2005. Three decades since *Prejudices and antipathies*: A study of the changes in the Library of Congress Subject Headings. *Cataloging & Classification Quarterly* 40, no. 2: 123–145.

Furner, Jonathan. 2007 [published 2008]. Dewey deracialized: A critical race-theoretic perspective. *Knowledge Organization* 34, no. 3, 144–168.

**Week 10: Classif-o-rama!**

Perec, Georges. 1997. Brief notes on the art and manner of arranging one's books. In *Species of spaces and other pieces*, pp. 144–151. London: Penguin.

Perec, Georges. 1997. Think/classify. In *Species of spaces and other pieces*, pp. 184–201. London: Penguin.