

LIS S632 Advanced Resource Management (Fall 2018)

IUPUI School of Informatics and Computing

Department of Library and Information Science

August 20 to December 10, 2018

Each week begins on Monday and ends on Saturday

Instructor: Bridget Burns

M.L.S. University of Maryland

Please use Canvas mail to contact me for class matters so that we can keep track of our correspondence. You can also e-mail me at burnsbri@iu.edu. Either way, I will return mail within 48 hours, at the most.

Phone or text: 301-286-7160

COURSE DESCRIPTION

An introduction to management of an acquisitions unit in libraries and other information agencies of all sizes and types. Content includes an overview of acquiring, providing access to, administering, supporting, and monitoring access to print and electronic resources. Principles of licensing, purchasing methods, and pricing models will be explored along with the complex relationships between vendors, publishers, platform providers, and information agencies.

Extended description

This course provides a practical foundation in the essential concepts, processes, and technologies driving electronic resource management in libraries. Electronic resources management encompasses the selection, acquisition, licensing, accessibility, linking, branding, evaluation, cost control, and preservation of licensed electronic resource. Topics covered include scholarly publishing, open access, library-vendor relations, information standards, contract law, copyright, linking and aggregation technologies, and the management systems used to control the administrative metadata for electronic resources. Course content will be of interest to all technical services staff who collect, manage, maintain, or make accessible electronic resources in any information environment.

Prerequisites

LIS S401 and LIS S502

Required textbook(s)

Ross, S.V.T., & Sutton, S.W. (2016). Guide to electronic resource management. Santa Barbara, CA: Libraries Unlimited.

Textbook available as an online resource via IUCAT.

Additional required readings are assigned for each module. Brief citations are listed in the Course Schedule below. Full citations to the readings appear at the end of this document. Additional readings can be found in Canvas, online, or searchable in IU databases.

EXPECTATIONS, GUIDELINES, AND POLICIES

Attendance

The course will be taught entirely online including web-based readings and resources, threaded discussions, plus online presentations and activities.

This course makes the assumption that students are able to work independently. There are no required face-to-face meetings. There may be required synchronous online meetings. Students are encouraged to e-mail or arrange an online chat with the instructor at any time.

Online participation is how students will demonstrate mastery of course objectives. I recommend that students stay active on Canvas each day. A basic requirement of this course is that you will actively participate in all class discussions and complete all required course assignments. Students are expected to complete the weekly readings and tasks on time, which is your attendance. If you believe you will not be able to complete a task for a certain reason (because things do happen in your lives), contact me ahead of time via Canvas mail.

Citing Sources

You are responsible for providing complete citations in all written assignments for materials you consult, quote, or otherwise borrow ideas from. Please cite using the APA (American Psychological Association) 6th edition.

Deliverables

You are responsible for completing each deliverable (e.g., task, final project) by its deadline and submitting it by the specified method. Deadlines and submission instructions are outlined in the syllabus or in supplementary documents accessible through Canvas. In fairness to the instructor and students who completed their work on time, a grade on a deliverable shall be reduced 10%, if it is submitted late and a further 10% for each 24-hour period it is submitted after the deadline.

Accommodations

In compliance with the Americans with Disabilities Act (ADA), all qualified students enrolled in this course are entitled to reasonable accommodations. Please notify the instructor during the first week of class of accommodations needed for the course. Students requiring accommodations because of a disability must register with Adaptive Educational Services (AES) and complete the appropriate AES-issued before receiving accommodations.

Students with learning disabilities for which accommodations are desired should contact the Adaptive Educational Services office on campus, and inform the instructor as soon as possible: [Adaptive Educational Services \(AES\)](#). Tel. 317 274-3241. Learning disabilities means any mental/physical/health condition that affects your ability to learn and complete assignments.

If you have a sudden and clearly temporary medical issue, like flu or a car crash, I can handle a request for a due date extension.

Most resources should be accessible to visually-impaired students. All task directions are in .pdf format. If .pdfs or web-based readings are inaccessible, please contact me for substitutions.

Canvas

Canvas is the main conduit of the course. All course announcements will be found in Canvas along with the course schedule, exercises for grade, practice exercises, answer keys, and other course documents. If you have problems accessing Canvas, please contact the University Information Technology Services (UITS) Support Center at 317-274-HELP.

Your Questions, Concerns, and Comments

Please do not hesitate to contact me directly via Canvas mail with any questions. I may answer a question publicly if the answer will be of general interest to others, but I will not reveal your identity. If needed, I will use Canvas Announcements to notify the entire class (e.g., syllabus change, my availability, etc.).

What Tools you Need

You are already using some browser, of course, but you will need to see if it is the most recent version. If it is not, update it. For PC users, you need to have the most recent version of Edge, Internet Explorer, Firefox, or Chrome. For Mac users, you need to have the most recent version of Safari or the most recent version of either Firefox or Chrome.

COURSE SCHEDULE

This is the tentative schedule for the semester. It is meant to give you an overall sense of the course content and pace. There may be some changes as the course progresses. If there are any changes to course readings, activities, and assignments, you will be notified in Canvas.

| Module | Topics | Readings | Tasks and Due Dates |
|------------------------|---|--|--|
| Week 1: 8/20 - 8/26 | Course Introduction and Background | Weber (2015) Introduction, Hawthorne (2008) | |
| Week 2: 8/27 - 9/2 | Overview of Electronic Resources Management | Ross & Sutton (2016) chapter 1, Elguindi & Schmidt (2012) chapter 3, Weir (2012) chapter 1 | |
| Week 3: 9/3 - 9/9 | Staffing and Workflows for Electronic Resources | Elguindi & Schmidt (2012) chapters 1, 2 Weber (2015) chapter 7 | |
| Week 4: 9/10 - 9/16 | Information Systems and Standards | Ross & Sutton (2016) chapter 3, Koppel (2008), Pesch (2008), Pesch (2011), Harris (2006) | |
| Week 5: 9/17 - 9/23 | Scholarly Communication & Open Access | Ross & Sutton (2015) chapter 10, Sutton (2014), Boissy (2014), Swan (2006) | |
| Week 6: 9/24 - 9/30 | Content Industry & Vendor Relations | Ross & Sutton (2016) chapter 2, Weber (2015) chapter 2, Koury (2012), Makler (2011), Ostergaard & Rossman (2017), Ryan & Smith (2014), Chamberlain & Emery (2010), Gagnon (2006) | |
| Week 7: 10/1 - 10/7 | Investigation of New Content | Ross & Sutton (2016) chapter 4, | Standards Research Presentation & Handout due 10/1 |

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| | | Johnson, S., Evensen, O. G., Gelfand, J., Sipe, L., & Zilper, N. (2012), Johnson (2013) | |
| Week 8: 10/8 - 10/14 | Acquiring Electronic Resources | Emery & Stone (2013a), Downey (2012), Ashmore, B., Weddle, J., & Grogg, J.E. (2012) chapters 1, 2, Carroll (2014), Weicher (2012), Pedersen (2014), Nabe (2012) | |
| Week 9: 10/15 - 10/21 | Licensing Electronic Resources | Ross & Sutton (2016) chapter 5, Weir (2012) chapter 4, Harris (2002), NISO (2015), LibLicense (2017) | |
| Week 10: 10/22 - 10/28 | Copyright | U.S. Code Title 17, "What's at stake" (2011), Anderson (2014), "Authors Guild" (2015), "CUP v. Patton" (2015) Creative Commons (2017) | |
| Week 11: 10/29 - 11/4 | Implementing and Providing Access | Ross & Sutton (2016) chapter 6, Emery & Stone (2013b), Millman (2009), Vaughn (2014), Walker (2015), Schonfeld (2016) | License Review due 10/29 |
| Week 12: 11/5 - 11/11 | Managing Access & Discovery | Ross & Sutton (2016) chapter 7, Mann (2014), Samples (2014) | |
| Week 13: 11/12 - 11/18 | Usage, Assessment, & Evaluation | Ross & Sutton (2016) chapter 8, Emery & Stone (2013c), Rogers (2012), Sutton (2013), Project COUNTER Code of Practice, Fleming-May & Grogg (2010) chapters 1-3, Rogers (2012), | |

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| | | Timms (2012), Cohen & Thorpe (2015) | |
| Week 14: 11/19 - 11/25 | No class – Thanksgiving | | |
| Week 15: 11/26 - 12/2 | Preservation | Ross & Sutton (2016) chapter 9, Nadal (2014) | |
| Week 16: 12/3 - 12/9 | Trends, Issues & Future Directions | Ross & Sutton (2016) chapter 11, Jennings (2009), Fluvog, et al., 2015) | Special Topic Paper due 12/10 |

COURSE ASSIGNMENTS

| Assignment | Due Date | Percentage of Final Grade |
|---|---------------|---------------------------|
| Class Participation & Homework/Activities | Weekly | 25% |
| Standards Research Presentation & Handout | October 1 | 15% |
| License Review | October 29 | 10% |
| Discussion Leader Task & Summary | By assignment | 25% |
| Special Topic Paper | December 10 | 25% |
| TOTAL | | 100% |

Class Participation & Homework/Activities: Students are expected to complete weekly readings and exercises and participate in weekly discussions through thoughtfully written posts and responses. Discussions provide an opportunity for you to demonstrate what you have learned, to share your experiences, and to broaden your understanding of the course content through conversation with your classmates. This is the core part of our class, and it is a much better experience when all students participate regularly, actively, and substantively.

Standards Research Presentation & Handout: Each student will research and critically examine the history, development and impact of an information standard. Specific standards will be selected early in the semester. Each student prepare and deliver a 5 minute video, narrated PowerPoint or other presentation software of your choice on their information standard. In lieu

of a paper, also prepare a handout, infographic, etc. summarizing and highlighting the main points you learned.

License Review: Students will review a license agreement between the vendor of an electronic resource and a library looking for library friendly and unfriendly clauses, suggesting alternative language for library unfriendly clauses, and suggesting points/clauses to be negotiated.

Module Discussion Leader Post & Summary: Each student will serve as online “discussion leader” for one week in the semester. At the beginning of the week, the discussion leader will post a 300+ word online post that summarizes/analyzes/critiques the major readings for the week, and pose at least two thoughtful questions for subsequent class discussion. The leader is also responsible for monitoring classmates’ subsequent online posts and responding appropriately. Discussion leader posts are due online by Sunday evening, 11:59 p.m., at the beginning of the week of service as discussion leader.

Within one week of the completion of service as discussion leader, students will prepare a 750+ word essay summarizing, analyzing, and responding to the week’s reading, incorporating questions and issues raised during the week’s discussion. An annotated bibliography of 3-5 “related readings” which have been identified through independent research should be included.

Special Topic Paper: Each student will research and critically examine a special issue, law or policy as it relates to electronic resource management. Topics will be selected and approved early in the semester. The final papers should be no longer than 12 pages, excluding references and appendices.

STUDENT LEARNING OUTCOMES

Course Learning Outcomes

By the end of the course, students will be able to:

- Summarize and explain each stage of the life cycle of e-resources.
- Understand technology standards and how they support electronic resource management.
- Analyze the evolving relationships among publishers, vendors, and libraries.
- Critically examine laws and policies that impact electronic resource management.
- Practice selection, licensing, and evaluation of electronic resources.
- Lead discussions, prepare and present original content to the class, and actively interact with classmates.
- Develop an understanding of the context and current issues in electronic resources management.

GRADUATE AND PROFESSIONAL LEARNING

Graduate students in professional graduate level programs on the IUPUI campus will demonstrate the following abilities:

1. Demonstrate the knowledge and skills needed to meet disciplinary standards of performance, as stated for each individual degree
2. Communicate effectively with their peers, their clientele, and the general public
3. Think critically and creatively to improve practice in their field
4. Meet all ethical standards established for the discipline

Student Learning Outcomes:

| By the end of the course, students will be able to: | PGPL | MLS Program Outcomes | Assessment |
|---|-------------|-----------------------------|--|
| Summarize and explain each stage of the life cycle of electronic resources. | 1 | 1I, 2A-D | Class Participation & Homework/Activities |
| Understand technology standards and how they support electronic resource management. | 1 | 4D | Standards Research and Presentation & Handout |
| Analyze the evolving relationships among publishers, vendors, and libraries. | 3 | 1J | Class Participation & Homework/Activities |
| Critically examine laws and policies that impact electronic resource management. | 3 | 1F, 1G | Class Participation & Homework/Activities Special Topic Paper |
| Practice selection, licensing, and evaluation of electronic resources. | 1 | 4C, 4D | License Review |
| Lead discussions, prepare and present original content to the class, and actively interact with classmates. | 2 | 1J | Discussion Leader Task & Summary |
| Develop an understanding of the context and current issues in electronic resources management. | 3 | 2A-D, 4D | Special Topic Paper |

PGPL: Principles of Graduate and Professional Learning

MLS PROGRAM OUTCOMES

This course supports the achievement of the following:

- Assist and Educate Users
- Approach Professional Issues with Understanding
- Develop and Manage Collections of Information Resources
- Use Research Effectively
- Deploy Information Technologies in Effective and Innovative Ways

ALA MLS COMPETENCIES

A person graduating from an ALA-accredited master's program in library and information studies should know and, where appropriate, be able to employ:

Foundations of the Profession

- 1A. The ethics, values, and foundational principles of the library and information profession.
- 1B. The role of library and information professionals in the promotion of democratic principles and intellectual freedom (including freedom of expression, thought, and conscience).
- 1C. The history of libraries and librarianship.
- 1D. The history of human communication and its impact on libraries.
- 1E. Current types of library (school, public, academic, special, etc.) and closely related information agencies.
- 1F. National and international social, public, information, economic, and cultural policies and trends of significance to the library and information profession.
- 1G. The legal framework within which libraries and information agencies operate. That framework includes laws relating to copyright, privacy, freedom of expression, equal rights (e.g., the Americans with Disabilities Act), and intellectual property.
- 1H. The importance of effective advocacy for libraries, librarians, other library workers, and library services.
- 1I. The techniques used to analyze complex problems and create appropriate solutions.
- 1J. Effective communication techniques (verbal and written).
- 1K. Certification and/or licensure requirements of specialized areas of the profession.

Information Resources

- 2A. Concepts and issues related to the lifecycle of recorded knowledge and information, from creation through various stages of use to disposition.
- 2B. Concepts, issues, and methods related to the acquisition and disposition of resources, including evaluation, selection, purchasing, processing, storing, and de-selection.
- 2C. Concepts, issues, and methods related to the management of various collections.
- 2D. Concepts, issues, and methods related to the maintenance of collections, including preservation and conservation.

Organization of Recorded Knowledge and Information

- 3A. The principles involved in the organization and representation of recorded knowledge and information.
- 3B. The developmental, descriptive, and evaluative skills needed to organize recorded knowledge and information resources.
- 3C. The systems of cataloging, metadata, indexing, and classification standards and methods used to organize recorded knowledge and information.

Technological Knowledge and Skills

- 4A. Information, communication, assistive, and related technologies as they affect the resources, service delivery, and uses of libraries and other information agencies.
- 4B. The application of information, communication, assistive, and related technology and tools consistent with professional ethics and prevailing service norms and applications.
- 4C. The methods of assessing and evaluating the specifications, efficacy, and cost efficiency of technology-based products and services.
- 4D. The principles and techniques necessary to identify and analyze emerging technologies and innovations in order to recognize and implement relevant technological improvements.

Reference and User Services

- 5A. The concepts, principles, and techniques of reference and user services that provide access to relevant and accurate recorded knowledge and information to individuals of all ages and groups.
- 5B. Techniques used to retrieve, evaluate, and synthesize information from diverse sources for use by individuals of all ages and groups.
- 5C. The methods used to interact successfully with individuals of all ages and groups to provide consultation, mediation, and guidance in their use of recorded knowledge and information.
- 5D. Information literacy/information competence techniques and methods, numerical literacy, and statistical literacy.
- 5E. The principles and methods of advocacy used to reach specific audiences to promote and explain concepts and services.
- 5F. The principles of assessment and response to diversity in user needs, user communities, and user preferences.
- 5G. The principles and methods used to assess the impact of current and emerging situations or circumstances on the design and implementation of appropriate services or resource development.

Research

- 6A. The fundamentals of quantitative and qualitative research methods.
- 6B. The central research findings and research literature of the field.
- 6C. The principles and methods used to assess the actual and potential value of new research.

Continuing Education and Lifelong Learning

- 7A. The necessity of continuing professional development of practitioners in libraries and other information agencies.

7B. The role of the library in the lifelong learning of patrons, including an understanding of lifelong learning in the provision of quality service and the use of lifelong learning in the promotion of library services.

7C. Learning theories, instructional methods, and achievement measures; and their application in libraries and other information agencies.

7D. The principles related to the teaching and learning of concepts, processes and skills used in seeking, evaluating, and using recorded knowledge and information.

Administration and Management

8A. The principles of planning and budgeting in libraries and other information agencies.

8B. The principles of effective personnel practices and human resource development.

8C. The concepts behind, and methods for, assessment and evaluation of library services and their outcomes.

8D. The concepts behind, and methods for, developing partnerships, collaborations, networks, and other structures with all stakeholders and within communities served.

8E. The concepts behind, issues relating to, and methods for, principled, transformational leadership.

GRADING SCALE

Below I have provided the percentage of the final grade represented by each assignment. Please note that while you earn points for each assignments, those points may not translate directly to the percentage of your final grade below (i.e. grades are weighted).

| Grade | Range | Description |
|-------|--------------|--|
| A | 100% to 93% | Outstanding achievement. Student performance demonstrates full command of the course materials and evinces a high level of originality and/or creativity that far surpasses course expectations. |
| A- | < 93% to 90% | Excellent achievement. Student performance demonstrates thorough knowledge of the course materials and exceeds course expectations by completing all requirements in a superior manner. |
| B+ | < 90% to 87% | Very good work. Student performance demonstrates above-average comprehension of the course materials and exceeds course expectations on all tasks as defined in the course syllabus. |
| B | < 87% to 83% | Good work. Student performance meets designated course expectations, demonstrates understanding of |

| Grade | Range | Description |
|---------------|--------------|--|
| | | the course materials, and performs at an acceptable level. |
| B- | < 83% to 80% | Marginal work. Student performance demonstrates incomplete understanding of course materials. |
| C+ through C- | < 80% to 70% | Unsatisfactory work. Student performance demonstrates incomplete and inadequate understanding of course materials. An incomplete may be granted under special circumstances. |
| D through F | < 70% to 0% | Student has failed the course. An incomplete is not an available option. |

Note that to satisfy a core requirement, grade must be B- or above. For electives, grade must be C or above (and overall GPA 3.0 or above).

Please see [Unofficial Withdrawal/Final Grades: FN, FNN and F Grading](#) for explanation of the different F grade options.

Incompletes

Incompletes are only available when unexpected events prevent completion of the course requirements in the usual time frame. No student with multiple incompletes may register for additional courses. Left unchanged, an Incomplete automatically becomes an F after one year. See: [IUPUI Registrar: Grade of Incomplete](#)

Administrative Withdrawal

A basic requirement of this course is that students participate in all class discussions and conscientiously complete all required course activities and/or assignments. If a student is unable to attend, participate in, or complete an assignment on time, it is the student's responsibility to inform the instructor. If a student misses more than half of the required activities within the first 25% of the course without contacting the instructor, the student may be administratively withdrawn from this course. Administrative withdrawal may have academic, financial, and financial aid implications. Administrative withdrawal will take place after the full refund period, and a student who has been administratively withdrawn from a course is ineligible for a tuition refund. Contact the instructor with questions concerning administrative withdrawal. Learn more at [IUPUI Administrative Withdrawal Policy](#)

COURSE EVALUATION POLICY

Course Evaluation Policy: Course evaluations provide vital information for improving the quality of courses and programs. Students are not required to complete a course or instructor evaluation for any section in which they are enrolled at the School of Informatics and Computing. Course evaluations are completed through Canvas. Course evaluations are open from the eleventh week. Course evaluations are anonymous, which means that no one can view the name of the student completing the evaluation. In addition, no one can view the evaluation itself until after the instructor has submitted the final grades for the course. In small sections, demographic information should be left blank, if it could be used to identify the student. A course evaluation must close before the grade for that course can be released. To ensure students have had ample opportunity to complete the evaluation, an uncompleted course evaluation could delay the release of the grade for up to a week.

STUDENT CODE OF CONDUCT

All students should aspire to the highest standards of academic integrity. Using another student's work on an assignment, cheating on a test, not quoting or citing references correctly, or any other form of dishonesty or plagiarism shall result in a grade of zero on the item and possibly an F in the course. Incidences of academic misconduct shall be referred to the Department Chair and repeated violations shall result in dismissal from the program.

All students are responsible for reading, understanding, and applying the Code of Student Rights, Responsibilities and Conduct and in particular the section on academic misconduct. Refer to the [IU Code of Student Rights](#)

All students must also successfully complete the Indiana University Department of Education ["How to Recognize Plagiarism" Tutorial and Test](#). You must document the difference between your writing and that of others. Use quotation marks in addition to a citation, page number, and reference whenever writing someone else's words (e.g., following the Publication Manual of the American Psychological Association). To detect plagiarism instructors apply a range of methods, including Turnitin.com.

Academic Misconduct

1. Cheating: ^[1]_{SEP} Cheating is considered to be an attempt to use or provide unauthorized assistance, materials, information, or study aids in any form and in any academic exercise or environment.
 1. A student must not use external assistance on any "in-class" or "take-home" examination, unless the instructor specifically has authorized external assistance. This prohibition includes, but is not limited to, the use of tutors, books, notes, calculators, computers, and wireless communication devices.

2. A student must not use another person as a substitute in the taking of an examination or quiz, nor allow other persons to conduct research or to prepare work, without advanced authorization from the instructor to whom the work is being submitted.
 3. A student must not use materials from a commercial term paper company, files of papers prepared by other persons, or submit documents found on the Internet.
 4. A student must not collaborate with other persons on a particular project and submit a copy of a written report that is represented explicitly or implicitly as the student's individual work.
 5. A student must not use any unauthorized assistance in a laboratory, at a computer terminal, or on fieldwork.
 6. A student must not steal examinations or other course materials, including but not limited to, physical copies and photographic or electronic images.
 7. A student must not submit substantial portions of the same academic work for credit or honors more than once without permission of the instructor or program to whom the work is being submitted.
 8. A student must not, without authorization, alter a grade or score in any way, nor alter answers on a returned exam or assignment for credit.
2. Fabrication: A student must not falsify or invent any information or data in an academic exercise including, but not limited to, records or reports, laboratory results, and citation to the sources of information.
 3. Plagiarism: Plagiarism is defined as presenting someone else's work, including the work of other students, as one's own. Any ideas or materials taken from another source for either written or oral use must be fully acknowledged, unless the information is common knowledge. What is considered "common knowledge" may differ from course to course.
 1. A student must not adopt or reproduce ideas, opinions, theories, formulas, graphics, or pictures of another person without acknowledgment.
 2. A student must give credit to the originality of others and acknowledge indebtedness whenever:

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 1. directly quoting another person's actual words, whether oral or written;
 2. using another person's ideas, opinions, or theories;
 3. paraphrasing the words, ideas, opinions, or theories of others, whether oral or written;
 4. borrowing facts, statistics, or illustrative material; or
 5. offering materials assembled or collected by others in the form of projects or collections without acknowledgment
 3. Interference:

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 A student must not steal, change, destroy, or impede another student's work, nor should the student unjustly attempt, through a bribe, a promise of favors or threats, to affect any student's grade or the evaluation of academic performance. Impeding another student's work includes, but is not limited to, the theft, defacement, or mutilation of resources so as to deprive others of the information they contain.
 4. Violation of Course Rules:

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 A student must not violate course rules established by a department, the course syllabus, verbal or written instructions, or the course materials that are rationally related to the content of the course or to the enhancement of the learning process in the course.

5. Facilitating Academic Dishonesty: A student must not intentionally or knowingly help or attempt to help another student to commit an act of academic misconduct, nor allow another student to use his or her work or resources to commit an act of misconduct.

IUPUI COURSE POLICIES

A number of campus policies governing IUPUI courses may be found at the following link: [Course Policies](#)