



University of Hawai'i at Mānoa

Library & Information Science Program
Information & Computer Sciences Department

COURSE SYLLABUS

Fall 2017

LIS 615: Collection Management

Instructor: Dr. Andrew Wertheimer

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Course Portal (Laulima): <https://laulima.hawaii.edu/portal>

Office Hours:

Tuesdays: 4:00-5:30 PM
Thursdays: 3:30-5:00 PM *or by appointment*

Class Time: Thursdays 5:00 - 7:40 pm

Location: Hamilton Library Room 3F

Note that we will have online class 16 NOV. 2017

Course Catalog Description:

LIS 615 Collection Management (3) Principles and issues of collection management and care. Criteria and tools for selecting and deselecting materials. Relationships with publishers/ producers. **Prerequisites:** None

Modular Learning

The LIS Program is experimenting with modular learning. This class is an example of such an offering in that there are options for assignments and a choice of two required textbooks. This approach is designed to help you focus on areas that relate to your professional interests.

Textbook & Readings

Required Textbook: (select one):

Edward G. Evans and Margaret Zarnosky Saponaro (E&S), Collection Management Basics: Sixth Edition. **6th ed.** Englewood, CO: Libraries Unlimited, 2012 ISBN 978-1-59884-864-9 (at the University Bookstore). (also available as an e-book)

Students in the school library media track may use an alternative text:

Kay Bishop (B), The Collection Program in Schools: Concepts, Practices, and Information Sources. **6th ed.** (Greenwood, CO: Libraries Unlimited, 2016) ISBN 9781610698238 (at the University Bookstore).

Additional Required Readings & Optional Supplement:

You are encouraged to purchase a copy of:

ALA Office for Intellectual Freedom, *Intellectual Freedom Manual (9th rev. ed.)* (Chicago: ALA, 2015). (Please purchase this edition.) ISBN-13: 978-0838912928. Much of the previous (8th edition) is online at <http://www.ifmanual.org/> (via the Internet Archive)

- Additional required readings are specified in the course schedule.
- Articles are available via UHM's electronic resources.

Assignments

Assignment 1: Journals on Assigned Readings (Laulima Posts)	20
Assignment 2: Book/ Media Review (Draft, Peer Critique, Final)	15
Assignment 3: Collection Management Policy Critique	5
Assignment 4: CM Research Summary / Critique	5
Assignment 5: A-1 & A-2: Collection Management Project (CMP) or Digital Collection Prospectus (DCP) – 2A- Written Proposal	5
Assignment 5: 2B: CMP or DCP – Oral Presentation	5
Assignment 5: Part 3: CMP or DCP – Portfolio / Prospectus	35
Assignment 5: Part 4: CMP or DCP – Reflective Journal	10
Participation	5

>>> See below for assignment instructions, assessment rubrics and grading.

Course Schedule

- This syllabus lists readings in both the Evans & Saponaro (E&S) and the Bishop (B) alternative text for students in School library track.
- Students using either text should read all additional readings mentioned in the syllabus.
- *This schedule is highly subject to change.* Lecture and discussion topics vary in response to current happenings in the profession.

Week 1	Getting Started; Understanding Collection Management / 1
Class: <u>24 AUG. 2017</u>	Intro <ul style="list-style-type: none"> a) Laulima, Syllabus, Modular Approach, Textbook b) Introductions c) Collection Management in the News d) Collection Management Heroes
Readings:	None.
DUE:	LAULIMA POST (Intro): By the end of the week (after class), post an introduction on Laulima (no credit)

Week 2	Understanding Collection Management / 2
Class: <u>31 AUG. 2017</u>	<ul style="list-style-type: none"> • Defining Collection Management <ul style="list-style-type: none"> ▪ Who Does Collection Management (CM) ▪ Changing CM Skills • Evaluating & Reviewing Media
Readings:	<ul style="list-style-type: none"> • E&S CHAPTERS: 1 and 2. • B CHAPTERS: 1, 2, and 3.
DUE:	LAULIMA POST 1: First Post on the Readings

Week 3	Collection Management: Practical Elements/ 1
Class: <u>7 SEP. 2017</u>	Understanding & Researching your Community Assessing Collections
Readings:	<ul style="list-style-type: none"> • E&S CHAPTERS: 3 and 4. • B CHAPTERS: 4, 5, 6, 7.
DUE:	Assignment 2: Book/ Media Review (Draft)

Week 4	Collection Management: Practical Elements/ 2 Selecting/ Evaluating Materials by Format
Class: <u>14 SEP. 2017</u>	(TRADITIONAL): Books; Serials (Magazines/ Journals); Audio-recordings: Tape/ Reel-to-Reel/ CD / Record (Formats); Video-recordings: VHS/Beta/DVDs; Kits, Realia, Paintings, Tools, Games, Toys... Selection Tools (BIP, BIP+, Reviews, vs. Blogs) Book Retail and Wholesale Trade (Jobbers... and Amazon) MANAGING COLLECTIONS – POLICY ELEMENTS
Readings:	<ul style="list-style-type: none"> • E&S CHAPTERS: 5 and 6 • B CHAPTERS: 8, 9, and 11. • Video on iTunesU (Interview with UCLA Subj. Spec. D. Hirsch)
DUE:	LAULIMA POST 2: Post on the Video and Readings +Assignment 2: Book/ Media Review (Peer Critique)

Week 5	Collection Management: Practical Elements/ 3
Class: <u>21 SEP. 2017</u>	Digital Content: How digital is different? Intellectual Access; Ease of Copying / Distribution Privacy of Digital Records; Legislation in Brief ; Help Interface; Branding; Ownership vs. Access; e-Books; Electronic Journals Databases; Audio-recordings; Video-recordings; The Internet and the Electronic Frontier Foundation
Readings:	<ul style="list-style-type: none"> • E&S CHAPTER: 7, 8, and 9 and. • B CHAPTER: 12 and 14 and. • Samuel Demas & Mary E. Miller, “Rethinking Collection Management Plans: Shaping Collective Collections for the 21st Century” (2012). <i>Collection Management</i>. pp:168-187 • http://dx.doi.org.eres.library.manoa.hawaii.edu/10.1080/01462679.2012.685415 • Carmelita Pickett, Jane Stephens , Rusty Kimball , Diana Ramirez , Joel Thornton & Nancy Burford (2011). “Revisiting an Abandoned Practice: The Death and Resurrection of Collection Development Policies.” <i>Collection Management</i>. pp:165-181 http://dx.doi.org.eres.library.manoa.hawaii.edu/10.1080/01462679.2011.580426 • Also watch either: The Story of the Digital Book, California Digital Library https://vimeo.com/63745693(10 min) [The Digital Public Library of America: See Robert Darnton on eBooks, Google Books, DPLA...

	http://www.youtube.com/watch?v=cOBNKvRzCAo (28 min)
DUE:	Assignment 2: Book/ Media Review (Final)

Week 6	Collection Management: Practical Elements/ 4
Class: <u>28 SEP. 2017</u>	Budgets, Grant-writing, Friends Groups & Fundraising
Readings:	<ul style="list-style-type: none"> • E&S CHAPTERS: • B CHAPTERS: 15, 16
DUE:	LAULIMA POST 3: Post on the Readings/ Video

Week 7	Collection Management: Practical Elements/ 5 Digital Collections, Consortia
Class: <u>5 OCT. 2017</u>	Consortia / Farmington Plan Briefly Introducing Interlibrary Loan/ Document Delivery Negotiating Electronic Resources-- Christian DeLay, Guest Speaker <ul style="list-style-type: none"> • Preservation • Deselecting / Weeding • Storing Materials • Digitizing Materials CM FOR TYPES OF INSTITUTIONS <ul style="list-style-type: none"> • Academic / Research Libraries • Archives & Record Centers • Information Industry • Public Libraries • School Library Media Centers • Special Collections & Museums • Special Libraries
Readings:	<ul style="list-style-type: none"> • E&S CHAPTER: 10 and: • B CHAPTERS: 10 and: 17, 18. • Jamie Ellis, "Lessons Learned: The Recovery of a Research Collection after Hurricane Katrina," <i>Collection Building</i> 26 (2007): 108 – 111.
DUE:	Assignment 3: Collection Management Policy Critique

Week 8	Collection Management: Practical Elements/ 6 Digital Collections
Class:	DNS Visit, Hamilton Library

12 OCT. 2017	
Readings:	Digital Collections and Repository Program (D-CARP): Best Practices and Standards http://guides.library.manoa.hawaii.edu/c.php?g=105219&p=687073
DUE:	Assignment 5: Collection Management Project (CMP) or Digital Collection Prospectus (DCP) – Post Choice of CMP/DCP, Client and Subject

Week 9	Collection Management: Practical Elements/ 7
Class: <u>19 OCT. 2017</u>	Evaluating Collections for Archives and Special Collections Understanding how Libraries, Archives, Museums (LAMs) Records Managers and Special Collections, define collections, provenance, and assess value on materials
Readings:	<ul style="list-style-type: none"> • E&S CHAPTER: 11 and: <ul style="list-style-type: none"> • B: None. • Jamie Ellis, “Lessons Learned: The Recovery of a Research Collection after Hurricane Katrina,” <i>Collection Building</i> 26 (2007): 108 – 111.
DUE:	Assignment 5: Collection Management Project (CMP) or Digital Collection Prospectus (DCP) – Written Proposal

Week 10	Collection Management: Practical Elements/ 8
Class: <u>26 OCT. 2017</u>	Student CMP/ DCP Presentations <i>Please sign up in speaking order and upload your presentations before class.</i>
Readings:	<ul style="list-style-type: none"> • Not this week
DUE:	Assignment 5: 2B: CMP or DCP – Oral Presentation

Week 11	Media Industry & Dealing with Indigenous Content
Class: <u>2 NOV. 2017</u>	THE INFORMATION INDUSTRY - BOOK PUBLISHING <ul style="list-style-type: none"> • Types of Publishers (Vanity/ University Press/ Small Press/ Alt. Press) • Basic Terms about Books and the Publishing Cycle (OP, OPI, HC, PA) • Used / Out of Print Books & the Antiquarian Market • SACRED CONTENT: INDIGENOUS MATERIALS

	<ul style="list-style-type: none"> • Discussion on ALA, SAA, IFLA and other Statements related to sacred content in collections.
Readings:	<ul style="list-style-type: none"> • E&S CHAPTER: 12. • B CHAPTER: 13. <p>And at least one of the following:</p> <ul style="list-style-type: none"> • Traditional Cultural Expression and Libraries http://wo.ala.org/tce/ <ul style="list-style-type: none"> ◦ (esp. TCE Task Force Final Report) • Digital Inclusion in Native Communities http://www.atalm.org/sites/default/files/Report%20for%20Printing.pdf http://www.atalm.org/node/312 • Karen J. Underhill, "Protocols for Native American Archival Materials" • <i>RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage</i> 7.2 (2006): 134-145. http://rbm.acrl.org/content/7/2/134.full.pdf • SAA, "Protocols for Native American Archival Materials": Information and Resources Page Protocols for Native American Archival Materials http://www2.nau.edu/libnap-p/ • Kay. Mathiesen, "A Defense of Native Americans' Rights Over Their Traditional Cultural Expressions" <i>American Archivist</i>, 75.2 (2012): 456-481. • <i>United Nations Declaration on the Rights of Indigenous Peoples</i> http://www.atalm.org/sites/default/files/united_nations_declaration_on_the_rights_of.pdf
DUE:	Assignment 4: CM Research Summary / Critique

Week 12	Social/ Ethical/ Political Contexts for CM/ 1
Class: <u>9 NOV. 2017</u>	<p>Intellectual Property, Open Access, & the Scholarly Publishing Crisis</p> <p>Historical Context of Intellectual Freedom (optional) How to Respond to Censors / Materials Challenge Resources for Intellectual Freedom Intellectual Freedom Challenge Exercise</p>
Readings:	<p>Intellectual Freedom Manual + Lester Asheim, "Not Censorship But Selection." <i>Wilson Library Bulletin</i> 28 (September 1953): 63-67.</p> <p>Lester Asheim, "Selection and Censorship: A Reappraisal." <i>Wilson Library Bulletin</i> 58 (November 1983): 180-184.</p>

	<p>Dianne McAfee Hopkins, "School Library Media Centers and Intellectual Freedom." (link at class website)/ http://www.ala.org/ala/aboutala/offices/oif/iftoolkits/ifmanual/fifthedition/schoollibrary.cfm</p> <ul style="list-style-type: none"> • Margaret Stieg Dalton, "A System Destabilized: Scholarly Books Today" <i>Journal of Scholarly Publishing</i> 37 (2005-6): 317-323. • Albert N. Greco, Robert M. Wharton, Hooman Estelami, and Robert Francis Jones, "The State of Scholarly Journal Publishing: 1981-2000." <i>Journal of Scholarly Publishing</i> 37 (2006): 155-214.
DUE:	Nothing

Week 13	<p>Social/ Ethical/ Political Contexts for CM/ 2 Media Industry & Dealing with Indigenous Content</p>
<p>ONLINE Class: <u>16 NOV. 2017</u> ** (online only)**</p>	<p>THE INFORMATION INDUSTRY - BOOK PUBLISHING</p> <ul style="list-style-type: none"> • Types of Publishers (Vanity/ University Press/ Small Press/ Alt. Press) • Basic Terms about Books and the Publishing Cycle (OP, OPI, HC, PA) • Used / Out of Print Books & the Antiquarian Market <p>SACRED CONTENT: INDIGENOUS MATERIALS</p> <ul style="list-style-type: none"> • Discussion on ALA, SAA, IFLA and other Statements related to sacred content in collections.
Readings:	<p>Read two of the following and watch the video:</p> <ul style="list-style-type: none"> • Nora Rawlinson, "Give 'Em What They Want." <i>Library Journal</i> 106 (15 November 1981): 2188-90. • Bob C. Murray, "The Case for Quality Book Selection." <i>Library Journal</i> 107 (15 September 1982): 1707-10. • Judith Serebnick, "Measuring Diversity of Opinion in Public Library Collections," <i>Library Quarterly</i> 65 (1995): 1-38. • Juris Dilevko, & Keren Dali, "Reviews of Independent Press Books in Counterpoise and Other Publications." <i>College & Research Libraries</i> 65 (2004): 56 -77. • Rebecca Knuth, & donna G. Bair-Mundy "Revolt Over Outsourcing: Hawaii's Librarians Speak Out About Contracted Selection." <i>Collection Management</i> 23 (1/2) (1998): 81-112. <p>[Video:] Watch Bill Moyers' <i>Buying the War</i> (PBS, 2007, 60 min) http://www.pbs.org/moyers/journal/btw/watch.html</p>
DUE:	LAULIMA POST 4: Post on the Readings

Week 14	
No Class: <u>23 NOV. 2017</u>	* No Class: State Holiday.

Week 15	
Class: <u>30 NOV. 2017</u>	<p>INTELLECTUAL FREEDOM-ETHICAL CONCERNS</p> <ul style="list-style-type: none"> • Discussion on Bill Moyers Journal. “Buying the War” (83 minutes) • Democracy, Propaganda and the Role of Libraries • The Alternative Press & Alternative Press Index • Local Alternative Media and Zines • Diversity, Racist Materials <p>Evaluating Collections & Curating Digital Collections & Exhibits</p>
Readings:	<p>Read two of the following and watch the video:</p> <ul style="list-style-type: none"> • Nora Rawlinson, “Give ‘Em What They Want.” <i>Library Journal</i> 106 (15 November 1981): 2188-90. • Bob C. Murray, “The Case for Quality Book Selection.” <i>Library Journal</i> 107 (15 September 1982): 1707-10. • Judith Serebnick, “Measuring Diversity of Opinion in Public Library Collections,” <i>Library Quarterly</i> 65 (1995): 1-38. • Juris Dilevko, & Keren Dali, “Reviews of Independent Press Books in Counterpoise and Other Publications.” <i>College & Research Libraries</i> 65 (2004): 56 –77. • Rebecca Knuth, & donna G. Bair-Mundy “Revolt Over Outsourcing: Hawaii’s Librarians Speak Out About Contracted Selection.” <i>Collection Management</i> 23 (1/2) (1998): 81-112. <p>[Video:] Watch Bill Moyers’ <i>Buying the War</i> (PBS, 2007, 60 min) http://www.pbs.org/moyers/journal/btw/watch.html</p>
DUE:	Assignment 5: Part 3: CMP or DCP – Portfolio / Prospectus

Week 16	Evaluating Collections & Curating Digital Collections & Exhibits
Class: <u>7 DEC. 2017</u>	<ul style="list-style-type: none"> • Curating Digital Collections & Exhibits • Evaluating & Measuring Collections <ul style="list-style-type: none"> ○ Library Mission ○ Formulae & Quantitative Approaches to Evaluating Collections ○ Qualitative Approaches to Evaluating Collections <p>Presentations on any group projects Course Evaluation Course-wrap-up</p>

Readings:	<p>John Willinsky, "Scholarly Associations and the Economic Viability of Open Access Publishing." <i>Journal of Digital Information</i> 4 (Article No. 177, 2003-04-09)</p> <p>Simon Tanner, "Economic Factors of Managing Digital Content and Establishing Digital Libraries." <i>Journal of Digital Information</i> 4 (Article No. 229, 2003-06-09)</p>
DUE:	<ul style="list-style-type: none"> • Assignment 5: Part 4: CMP or DCP – Reflective Journal

Finals Week

There is no exam in this course or class meeting during Finals Week. Please keep up with the readings though. All papers and extra credit must be handed in by 5 DEC. 2017.

Instructions for Specific Assignments

(Please consult the course schedule for due dates.)

Assignment 1: Journals on Assigned Readings

Instructions:

- Post on LAULIMA a well-constructed mini-essay (two-to-three paragraphs) with your response to the assigned readings or videos for the period. Do not simply summarize the text, but rather you should focus on some aspect that shows that you not only read the text / reading but are critically thinking about it. If you have a question go try to find the answer and write up your findings.
- Please be sure to cite page numbers from the text and any other references you mention.
- Each Laulima posting is listed on the course schedule.
- Be sure to POST REPLY rather than creating a new forum.

Submission Instructions:

>> Post this on the appropriate LAULIMA FORUM on the date due listed in the schedule

Evaluation for your Laulima Journal:

Your postings will be evaluated in terms of originality, critical reflection, quality of writing, interaction with other postings and with CM News, lecture/ discussion notes. Evaluation will be posted in two parts like participation scores.

Assignment 2: Book/ Media Review (Individual Work) (with peer critique)

For generations librarians have looked for each other for expertise on the art of reviewing books and other materials. This assignment is to help get you started as a library reviewer. For this assignment you are to write a publishable review of a book, video, database, etc. You should review a book related to Hawaii or the Pacific to appear in the *Holoholo Review*. Instructions for review criteria are listed in Appendix 2. You will be evaluated based on those criteria, and how you respond to comments I make on the first draft.

Instructions:

Write a 1-2 page review of a book / film/ CD / database (preferably with some connection to Hawai'i or the Pacific). Give a full bibliographic citation (author's full name/full title/ publisher's city/publisher/ISBN/number of pages/ year of publication). Give a brief summary of the book/item. Write a brief review suggesting what kind of reader / user would benefit from the item, and whether you would suggest it for a library purchase. This assignment consists of points for the original draft, peer revision, and the final draft.

ALTERNATIVE OPTION: Several professional library publications publish book / library media reviews. With most, you cannot select the specific book to be reviewed, but you obviously can select the journal you want to be a reviewer for.

If you want to do this alternative option, you should contact the journal's book review editor and secure approval to do a review. You should submit a double-spaced draft to me, and get my OK before sending it to the journal. You are encouraged to secure permission / get feedback on this option before as early as possible.

Submission Instructions:

Steps 1 & 2:

Save your first draft as **615_RevDraft_YourLastName.doc** and send it to Dr. Wertheimer as an MS Word attachment using LauLima's mail function. Also send your peer a copy of your review.

Step 3:

Send your peer critique of your partner's review either as an e-mail with a cc to wertheim@hawaii.edu or give Dr. Wertheimer a copy of your written comments. In either case be sure the paper clearly states the full names of the original writer and the peer critic.

Step 4:

Save your final draft as **615_RevFinal_YourLastName.doc** and send it to Dr. Wertheimer as an MS Word attachment using LauLima's mail function.

Evaluation for your Review:

The assessment is primarily based on the final product, however, you will receive up to 1 point for sending in a well-written draft following the instructions. You will receive up to 4 points for quality peer comments. Details are listed below:

Your first draft review will be evaluated on the following criteria:

Original draft has proper citation format, is submitted in time and follows instructions. It may not be perfect, but represents a good first draft with few obvious writing problems.	1 point
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Your peer critique will be evaluated on the following criteria:

You gave the paper a good review in terms of grammar, spelling, and other writing issues.	2 points
You gave positive, but critical feedback beyond basic editing that can help the review.	2 points

Your final review will be evaluated on the following criteria:

a) The item you selected related to the focus of the review outlet (<i>HoloHolo Review</i> or real journal).	1 point
b) The review follows guidelines, such as citation, word length, and required elements. The publication data is checked in <i>Books in Print</i> or the publisher's website.	1 point
c) The review includes some additional research on the writer or book. It includes brief mention of other titles/ first work/ awards won, educational background or relevant experience.	1 point
d) The review gives a clear summary of the item, so that someone could clearly imagine the item. For fiction, this would include something on writing style or comparing it to other writers.	3 points
e) The review is original, well written and well organized . It is improved based on suggestions by the professor and peer reviewer.	4 points

Assignment 3: Collection Management Policy Critique (Individual/ Group Option)

Instructions:

Find a library or archive's Collection Management Policy and write up a brief analysis, focusing on how it compares with the elements described in the textbook or lectures. You can examine any larger library's or archive's policies. (Please do not examine branch library unless you do it in tandem with the library's parent organization). Write up about one page min-essay with your reflections and analysis. If you are stuck on what to write, you might find it interesting to compare it with a similar library's policy. *This assignment can be done in a group of two.*

There are two options for this assignment. You can either write up a critique of two or more existing CM policies or you may compose an original Collection Management Policy, based on examination of several relevant models. ***I strongly encourage you to do the critique unless you have a pressing reason to do the second option for a real library, archive, or information center.*** This assignment may also be done individually or in groups of up to four people (with one paper listing all names).

Critiquing CM Policies

You should locate *at least* two CM policies and analyze them. These policies should be comparable (i.e., relating to the same type of library or collection) but in different locales. At least two of the collections should be at a parallel level (i.e., system-level or collection-level or branch-level).

You can either compare them or you can focus your analysis on one of the policies, but should make observations based on the other policies and your text. Your first brief paragraph should explain why you selected the particular policies. It might be helpful to focus your essay on the question of how applicable these policies are for another specific library. You should use your class notes and textbook or other readings to offer educated comments. Please be specific and be sure to cite information sources. The final product should be around a one page paper in either journal or report format.

Submission Instructions:

>> Post this in the LAULIMA FORUM: Assignment 3: **CM Policy Critique**

Examples of existing policies may be mentioned in class, and are also cited in the textbook. You can find many more by doing an advanced online search for “[x type of institution (e.g., high school)] library” and (“Collection Development” or “Collection Management”) and Policy.”

Evaluation for the CM Policy Critique:

Your proposal will be evaluated on the following criteria:

a) The journal or essay is based on appropriate model policies , which are well cited.	1 point
b) The journal or essay is well written and organized .	1 point
c) The journal or essay cites relevant information from the textbook or lectures (possibly in addition to other materials) on CM Policies.	1 point
d) The journal or essay shows the importance of CM Policies, and the various elements .	2 points

Assignment 4: CM Research Summary / Critique

Instructions:

Write a few paragraphs with an introduction and critical reflection on one of the articles listed in Appendix 3. If you find another article on collection management published within the last five years in a peer-reviewed journal you may select that instead of one from the list. No more than one student per citation unless you have a very different analysis of the article.

Submission Instructions:

>> Post this on LAULIMA FORUM: Assignment 4: **CM Research Critique**

Evaluation

Your CM Research Critique will be evaluated on the following criteria:

a) Concise summary of the article's thesis.	1 point
b) Critical analysis of the article. Brief mention of the author's background and citations in terms of supporting the author's credibility.	2 points
c) Well written paper. Professional writing in terms of grammar, spelling, and logical flow.	1 point
d) The article is compared with relevant articles and/or lecture/ class readings / CM news or other information that helps readers to contextualize the article.	1 point

Assignment 5: Collection Management Project (CMP) or Digital Collection Prospectus (DCP)

Collection Management Project (CMP) or Digital Collection Prospectus (DCP)

The main assignment for this class is a practical exercise in collection development. Students have two options. You may develop a traditional Collection Management Project (CMP), which is primarily based on selecting published print and digital resources for a traditional library, or you can develop a Digital Collection Prospectus (DCP). I assume that students intending to be public or school media librarians will select a CMP. Academic and special librarians, archivists, and students focusing on informatics will probably benefit more from doing the DCP exercise.

The DCP will involve research, writing, and some technology and web skills. Both options will require you to develop a preliminary proposal (paper and presentation) and a reflective journal on the experience.

This assignment, when complete, should be something that can demonstrate your skills to a potential employer and could be part of your e-portfolio. Because of LIS Program requirements on e-Portfolio projects this cannot be a group project. Either option will take considerable time, so I encourage you to get an early start.

Option 1 (Traditional): The Collection Management Project (CMP)

The Collection Management Project (CMP) is a practical exercise in collection development. You will propose collection parameters and then select materials for a specific library. This will be a lot of work, so don't underestimate this project; however, I hope you will also enjoy the learning process of shaping a collection.

I encourage you to select a type of library that you want to work in, and a subject that you are familiar with and/ or interested in. For example, if you have a degree in Asian American literature and want to work in a local public library, then you might propose developing a collection of 45 items relevant to Chinese American poetry (including databases, books, and journals) for some specific library like Kalihi Public Library. On the other hand it should not be the same topic as one you've used for your LIS 601 bibliography plan or another LIS assignment. Another proposal could be for natural science books for grades 2-4 at Waimalu Elementary School Library Media Center. Another proposal could be materials on bioengineering for a special library. The topic **must be non-fiction** unless you can make a good case for a specific fiction collection. You should include a mixture of books, databases, journals/ magazines. You should also add a few relevant videos/ DVDs/ CDs. See details below.

You can choose any **non-fiction** subject, although you might keep in mind that you will want to appeal for a "grant" to fund your topic, so I encourage you to come up with a topic that you might try to convince a not-for-profit organization to subsidize.

You may **not** select fiction/ drama/ poetry unless you receive permission due to a very narrow specific topic (e.g., fictional memoirs of American women in history for 6th graders). In such case you must provide very detailed criteria for selection, and also clearly show how each work meets the criteria.

You must select a real library and community for the CMP. You are to describe the library, the users and the collection in some detail. You will eventually select 45 items (books, journals, databases, etc.) for your CMP. Although you've selected a real library, you needn't concern yourself with the library's actual holdings.

At least 15 items should be submitted with complete citations to reviews, and should be selected at least partly because of these reviews. The remaining 30 do not need to be reviewed, although each citation should include a brief write-up explaining why you selected it. Your CMP Journal also should explain what criteria and selection tools you used to select your CMP. Of course, appropriate reviews would be one natural criterion, although they are not required.

Your CMP should include at the following types of items:

- 1) At least one Out-of-print book [OP]
- 2) At least one (S) Serial, such as a journal or magazine subscription (1 year)
- 3) At least one audio-video recording (either CD or DVD, etc.)
- 4) At least one e-book
- 5) 5-10 digital media resources. At least one should be a commercial database with a one-year subscriptions (1 year).

Your CMP list should be numbered (1) to (45). The 15 items with complete citations of reviews should be noted with an asterisk (e.g., 3*). You should also note (S) Serial; (D) Database/ Digital

Subscription; Out-of-Print item (OP); Audio-Video Material (A-V); (e) e-Book. You may indicate that an item is for the (R) Reference collection.

Your collection should be presented in some logical order (ideally by sub-topic, and then by author's last name).

Please pay careful attention to all of the various stages.

CMP STAGE 1: Topic Selection (No Credit)

Your first step will be to select the type of library and the collection topic. You must secure approval for your topic. You may collaborate with other students in analyzing the same library, but you are responsible for doing your own work on the presentation and collection.

I discourage overlap of subjects, so topics will be claimed on a first come first served basis, so let me know as soon as possible, especially if you want to develop a collection on a popular topic, such as on AIDS for a junior high school library.

This should be posted on Laulima. Be sure to see what else others have already reserved before you.

CMP STAGE 2-A: Proposal Paper (5% of your course grade)

The brief (3-5 pages) proposal should include a description of the library and demographics of its users, the parameters of your collection, and a proposed budget.

This paper should be written **persuasively** to demonstrate the benefit of this collection to the library. You may use this paper to complete parts (a) and (b) of your CMP Portfolio, although you are strongly encouraged to make revisions based on the instructor's comments. Topics are accepted on a first-come first accepted basis. Only one student may select a certain topic. Be sure to secure permission before selecting a topic that was used in one of the sample papers.

Along with your Proposal Paper, you should also submit *at least* five sample review items from your portfolio. This is to give you feedback on format, etc. Please see instructions for Stage 3.

SUBMISSION INSTRUCTION:

Save your proposal paper as **615_CMPPro_YourLastName.doc doc** and send it to Dr. Wertheimer as an MS Word document attachment using Laulima's mail function.

Evaluation

Your proposal will be evaluated by the instructor on the following criteria:

a) Detailed yet concise library and community demographic profile	1 point
b) Very clear and specific parameters of the proposed CMP such as: <ul style="list-style-type: none">• Price range for print and other materials• Dates of publication that you will consider• Reading levels that you will consider (presumably based on community demographics)• Scholarly / reading level (reflecting the library's CM policy and mission statement, etc.)• How you will break the topic into parts (i.e., 5% of the collection will be	1 point

<ul style="list-style-type: none"> on Biology for 6th graders) Specific aspects that will reflect your library’s demographics as you select items (such as 10% materials in Basic English for a community with many new immigrants). 	
c) Logical and reasonable budget proposal, including cited evidence on how you came estimated your budget.	1 point
d) Overall writing and <u>persuasive writing</u> as to why a not-for-profit organization would want to fund your topic (explaining how the materials you select will specifically benefit your community). For the full credit, you should specify specific metrics / assessment instruments that will show benefit of the grant.	1 point
e) The quality of the sample CMP item(s) review. See criteria listed under the CMP Portfolio.	1 point

CMP STAGE 2-B: Oral CMP Presentation Grant Proposal (5%)

You will present your CMP proposal to the class in the form of “pitching” a grant proposal. You should pretend that I am the chair of the (fictitious) KASHU FOUNDATION, and that your classmates are board members. Explain briefly how you will select the items. You should try to persuade people (imagine a committee of non-librarians) why they should support your grant proposal.

Note: If you are doing this for a real library and have a real grant opportunity, please explain the context to the class before the presentation. You should obviously incorporate instructor comments from (2-A) as you develop this.

You will be giving an oral grant proposal (4-5 minutes) in which you will outline your proposal. You should also be ready for a few Q&A from the class, which are not timed. *You are required to use either handouts, or PowerPoint, etc.*

Evaluation

Your presentation will be evaluated on the following criteria:

a) Overall speaking skills. Creative, persuasive, and professional presentation. Ability to persuade listeners that the grant would make a difference, and thus should be funded.	2 points
b) Clear brief description of the library, library’s users, CMP topic, and budget.	1 point
c) Following instruction requirements, including staying within the time parameters.	1 point
d) Well written and well-designed presentation or handout (including graphic design)	1 point

CMP STAGE 3: The CM Portfolio (35%)

You should write your CMP Portfolio as the final report to the KASHU FOUNDATION. Be sure to read both the instructions and evaluation rubric below.

It should include:

(a, 1-2 pages): **Institutional Description** of the library, users, and existing collection, [This should be based on the CMP Proposal, but the language should be modified as if you received the grant, and are reporting on the progress].

(b, 1-2 pages): Parameters of the proposed collection, primarily subject description, but also relevant questions such as formats, acceptable, publication dates, primary emphasis, etc.

(c1-4, one-thirds of a-page to 1 page *per title*): Information on Selected Items.

(c#) Each citation should be numbered and grouped or presented in some rational order (by selected topics, alphabet, etc.).

(c1) Complete citation: Books should include Author, Title, Publisher (Location City), Publisher's Name, ISBN/ISBN13, number of pages, and the publication year. Journals should include ISSN. OP books and A/V items do not need any item codes if none are available. Follow a standard citation style.

(c2) The *current* list price in US\$ for PA (paperback) or HC (cloth). You may calculate in a discount if explained in the budget-narrative section. Cite price source if this is below the list price.

If the book is **out of print**, you should indicate this and list the source of the O.P. Price (e.g., \$14 HC Used VG, listed from Blue Mountain Bookstore on ABE),

Databases and journals should include full information on vendors and the cost of a 1-year institutional subscription, if this information is available. Indicate N/A if you checked and it is not available.

(c3) Citations to published reviews (Amazon.com-type user reviews do not count). [See appendix to this syllabus on "Evaluating Reviews and Selection Tools." This applies primarily to the first 15 items.]

(c4) The most important part of each item is your own **rationale for selecting the specific item**. This could be based on your own personal evaluation of this work, reviews, reviews of other works by the author, and other related criteria. You might include information on summarizing reviews, author's qualifications, quality of book construction/ user-friendliness of database, etc. If you did not examine the work in person, you should refer to the reviews and add your own rationale for selecting the item. *Be especially careful to avoid plagiarizing from a review or the publisher's information.*

Many of these texts can be brief, such as 2 or 3 sentences. However, I expect longer and more detailed explanations comments to support any of the following: a) more expensive items, b) works that are older or nonstandard, c) anything that falls beyond your original parameters, d) ones that are published by lesser quality / questionable publishers, e) More than 5 selections by the same publisher. Without strong justifications, such as quality reviews, these kinds of entries will detract from your grade.

(d, 1 page): Budget-Spreadsheet. I encourage you to do this on Excel or other spreadsheet. You do *not* need to list each book and price here, only totals, and a comparison with the proposal budget.

(I do not penalize or reward you for going over/ under budget, but want you to reflect on the realities of real budgets).

(e, 2-3 pages): Budget-Narrative: This should explain aspects of the budget, such as discounts and how database or journal prices were determined. Parts (d) and (e) may be combined into 1-3 pages. Do not use this space to list individual prices.

(f, 2-4 pages): Summary: This should include the limitations of the collection and propose further growth areas. This should also summarize the core of your collection. You should also use this section as a sales pitch to emphasize the value of this collection to your institution.

I encourage you to think of this project as an ideal portfolio project to show potential employers.

SUBMISSION INSTRUCTION:

Save your portfolio as **615_CMP_YourLastName.doc** and send it to Dr. Wertheimer as an MS Word document attachment using Laulima's mail function.

Evaluation

Your proposal will be evaluated by the instructor on the following criteria:

a) Institutional Description of the library (institutional profile, user's demographics, and existing collection) is rich with relevant and varied and cited data. This section includes responses to suggestions made in the CMP Proposal. A perfect score shows original writing that builds on authoritative information that would be convincing to a funding agency.	2 points
b) Very clear and specific CMP Parameters . What were the criteria used to plan the collection (price, reflection of demographics, price range for materials, date range of publications, and reading levels. Explain specific criteria from your library's demographics that influenced how you established criteria (such as 10% materials in Basic English for a community with many new immigrants). This section includes responses to suggestions made in the CMP Proposal, as well explanation of any changes you did while creating the CMP.	2 points
c) Professional presentation of your CMP, including aesthetics, the cover page, typography, margins, and following all instructions. Items are presented in some order (ideally topical, then alphabetical by author's last name).	3 points
d) The Summary is well written, persuasive, and reiterates points made in the profile, parameters, and individual items. It explains the value of this collection to your institution and the potential impact on users. It also includes limitations of the collection and proposes areas for further growth areas	4 points
e) The Budget section is thorough and easy to follow. The narrative is well written. The budget follows the directions. It is clear at the citation level whether each item selected is paperback or hardcover. Criteria for electronic materials price are explained in detail. Budget calculations are correct, and contrasted with the proposed budget. One table presents (a) the Proposed Budget, (b) the Final Budget, and (c) the difference.	4 points
f) Individual citations are complete (ISBN13 or ISBN or ISSN, publisher, city of publication, date of publication, edition number, etc) and are in a standard bibliographic form. Information on used materials and journals is complete. OP items include (condition, vendor).	4 points
g) The Rationale for selecting each item is clear, original, and well written. These are based on reputable reviews and personal evaluation of materials. Rationales for selecting more expensive items, such as databases and reference works should be longer than the others, and explain why you selected it over alternatives.	8 points
h) Overall Quality of the Collection . The collection is diverse (from a variety of publishers) and is carefully selected to meet the various audiences described in the profile. It represents different perspectives, and appears to be well selected based on an understanding of community needs and the best materials available. The CMP Journal and cited reviews show that various approaches were used to find the most appropriate collection given. This includes the appropriateness of your selections to match the parameters and community/ library profile . This may be more of an art than science, but	8 points

<p>will be evaluated based on the judgment of a seasoned selector and the real state of publishing. For example, if you decided that you were going to select studies of Japanese novelists active after World War II, I would wonder if you did not select a work on Nobel Prize Winner Kenzaburo Oe. You can help satisfy this aspect by mapping your planned selection, and describing in some detail how you approached your topic in your journal.</p> <p>This also includes the quality of the items selected using standard library criteria. For example if you proposed a CMP on the American Civil War for a high school library media center, I would be very suspicious if you selected a vanity press memoir (especially without reputable reviews), a textbook, costly reprint, narrow dissertation, children’s picture book, etc. unless you make a solid case for the exception.</p>	
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CMP STAGE 4: CMP Reflection Journal (10%)

The final portion of your CMP is perhaps the most important, since it is a reflective exercise. It consists of an 8 to 10 page journal in which you will evaluate the exercise as a personal reflection on the learning experience.

Your essay should first record (a) how you went about mapping your topic and searching for items, including specific indexes, databases, or other tools. This section should be somewhat detailed (although brief and concise) since this impacts your grade on the CMP itself. The second part is to (b) reflect on what you learned from the experience, such as **what you learned about at least a few specific publishers, reviewers, and review media**. If you think that you did not learn anything about the above, then you are strongly encouraged to do some research as part of your journal, as you will be graded on your reflections of the learning experience. Even experienced selectors should endeavor to make the CMP and Journal learning experiences.

(c) You should also reflect on weaknesses in the CMP (e.g., you were unable to find many good children’s books on AIDS in Spanish for a San Diego high school library CMP dealing with health). You should also (d) critique your own abilities as a selector, as well as the tools you used. You may add information, such as some discussion of reasons you did not select certain items or types of items from your collection. You may incorporate notes from readings or class discussions in this section.

Do **not** waste your time or space by complaining that it was a long assignment. I already know it is time-consuming, but this is how we master the art of selection. Many graduates have written me that their CMP was their most useful LIS assignment. I also use this in evaluating your CMP.

SUBMISSION INSTRUCTION:

Save your journal as **615_CMPJ_YourLastName.doc** and send it to Dr. Wertheimer as an MS Word document attachment using Laulima’s mail function.

Evaluation

Your journal will be evaluated on the following criteria:

a) Reflective Narrative explanation of how you [1] mapped out your topic, and [2] searched for items. [3] Concise but detailed listing of specific indexes, databases, or other tools (including those mentioned in the textbook, lectures, from shadowing, and especially your own unique findings relevant to the topic).	3 points
b) Reflection on the above collection management tools (critical evaluation	3 points

review sources, <u>and</u> specific reviewers) for both retrospective and current awareness.	
c) Critical Reflection and information on publishers, vendors related to your topic and overall selection.	2 points
d) Critical Reflection on your CMP's strengths and weaknesses. How could it have been improved? What did you do that worked or what would you have done it differently?	1 points
e) Critical Reflection on yourself as a selector. Using the text and lecture materials, how have you grown as a selector, and what can you do to improve your abilities as a selector?	1 point

Option 2 (New): Digital Collection Prospectus (DCP)

The Digital Collection Prospectus (DCP) also is a practical exercise in collection development, although it is taking collection management ideas beyond the traditional brick and mortar library model.

In developing a DCP, you will need to put together a preliminary proposal, presentation, and final presentation with an outline for a Digital collection. Thus, you will be evaluated on creative efforts (related to graphic design, content, ability to pitch a project) as well as research on standards and other technical materials.

You will be selecting a real client, but do not have to be in contact with the organization. If you select a non-profit organization / university library / archive you will be developing this as a grant from the KASHU FOUNDATION. If you are doing this for a private corporation or government agency, you also can propose this as a request for investors or institutional support. Requests for internal funding will still be expected to do a presentation and other requirements, but should stress return on investment and other goals related to the parent organization's mission and objectives.

I encourage you to select a type of client that relates to your career objectives, as well as a subject that you are familiar with and/ or interested in. For example, if you have a degree in Latin American literature and want to work in a university library, then you might propose developing a digital collection about a Latin American poet (including poems, A/V recordings, letters, journals) for some specific library like UHM's Hamilton Library. On the other hand it should not be the same topic as one you've used for your LIS 601 bibliography plan or another LIS assignment. Another proposal could be materials on bioengineering for a special library. Some imaginary projects include:

- Digital Archive on "Strikes in the Territory" for UHWO's CLEAR Library
- "Fifty Years of Aloha Shirts" for the Acme Aloha Shirt Company Customer Relations Unit
- "Kanakanaka Health: GPS maps, pollution, community and health indicators" for the UHM Center on Native Health Research
- "Revisiting the Massie Case" for the Center for Legal Historical Justice
- "Issei Eating: Recipes, Images, and Nutrition in Retrospective" for KCC Culinary Studies and KCC Library

Unlike some of the examples above, however, you must select a real client and community for the DCP. You are to describe the organization, the users and the collection in some detail. Your project should be unique and original, yet realistic. You should also do some market research to verify the uniqueness of your plan. For example if you propose a digital library on Hawaii place names, you will need to make a strong case why your model is superior to existing resources.

Please pay careful attention to all of the various stages.

DCP STAGE 1: Topic Selection (No Credit)

Your first step will be to select that you want to do a DCP, and select the client and collection topic. You must secure approval for your topic. You may collaborate with other students in analyzing the same client, but you are responsible for doing your own work on the presentation and collection.

I discourage overlap of subjects, so topics will be claimed on a first come first served basis, so let me know as soon as possible, especially if you want to develop a collection on a popular topic. This should be posted on Laulima. Be sure to see what else others have already reserved before you.

DCP STAGE 2-A: Proposal Paper (5% of your course grade)

The brief (3-5 pages) proposal should include a description of the client and demographics of its users, the parameters of your collection, and a tentative proposed budget.

This paper should be written **persuasively** to demonstrate the benefit of this collection to the library. You may use this paper to complete parts (a) and (b) of your DCP, although you are very strongly encouraged to make revisions based on the instructor’s comments. Topics are accepted on a first-come first accepted basis. Only one student may select a certain topic. Be sure to secure permission before selecting a topic that was used in one of the sample papers.

Students may want to refer to a document such as the Library’s Digitization Project Survey found at <http://guides.library.manoa.hawaii.edu/c.php?g=105219&p=687076>

SUBMISSION INSTRUCTION:

Save your DCP Proposal paper as **615_CMPPro_YourLastName.doc** and send it as an MS Word document attachment using Laulima’s mail function.

Evaluation

Your proposal will be evaluated on the following criteria:

a) Detailed yet concise client (mission, strategic plan) and community demographic profile	1 point
b) Very clear and specific parameters of the proposed DCP such as: <ul style="list-style-type: none"> • Type of materials to be included (IP, Format, date, provenance) • How many items will be digitized, and how (if not yet digital) • Potential audience(s) • Specific issues related to audience or client that will impact the DCP 	1 point
c) Logical and reasonable budget proposal, including cited evidence on how you	1 point

came estimated your budget.	
d) Overall writing and <u>persuasive writing</u> as to why a not-for-profit organization would want to fund your topic (explaining how the DCP will specifically benefit your community). If you are pitching for internal funding you should show how you are meeting organizational goals and missions.	1 point
e) The quality of the sample DCP item(s). See criteria listed under the DCP.	1 point

DCP STAGE 2-B: Oral DCP Presentation Grant Proposal (5%)

You will present your DCP proposal to the class in the form of “pitching” a grant proposal. You should pretend that I am the chair of the (fictitious) KASHU FOUNDATION, and that your classmates are board members. Explain briefly how you will select and curate the items. You should try to persuade people (imagine a committee of non-librarians) why they should support your grant proposal.

Note: If you are doing this for a real library and have a real grant opportunity, please explain the context to the class before the presentation. You should obviously incorporate instructor comments from (2-A) as you develop this.

You will be giving an oral grant proposal (4-5 minutes) in which you will outline your proposal. You should also be ready for a few Q&A from the class, which are not timed. *You are required to use either handouts, or PowerPoint, etc.*

Evaluation

Your oral presentation will be evaluated on the following criteria:

a) Overall speaking skills. Creative, persuasive, and professional presentation. Ability to persuade listeners that the grant would make a difference, and thus should be funded, including potential evidence from relevant metrics.	2 points
b) Clear brief description of the client, audience, users, DCP topic, and budget.	1 point
c) Following instruction requirements, including staying within the time parameters.	1 point
d) Well written and well-designed presentation or handout (including graphic design)	1 point

DCP STAGE 3: The DCP Portfolio (35%)

You should write your **DCP Portfolio** as the final report to the KASHU FOUNDATION (unless you are pitching this for an internal or other funder). Be sure to read both the instructions and evaluation rubric below.

It should include:

- (a, 2-3 pages): **Institutional Description** of the client, client’s mission, goals and objectives, users, and existing collections, [This should be based on the **DCP Proposal**, but the language should be modified as if you received the grant, and are reporting on the progress].
- (b, 5-15 pages): **Narrative Discussion on the DCP**. This section should include detailed examination of how you will deal or are dealing with the following technical relevant **Standards**, ethical questions, and other issues. In each case, be sure to explain why you made your choice. Using footnotes, cite articles, and standards that guided your decision-making.

- Explain the DCP’s **Content Management System (CMS)**. Why did you select this option? What standards do they meet?

- You should also investigate your institution's in-house hosting resources (e.g., UHM Hamilton DNS) vs. SaaS resources (e.g. <https://libraryhost.com/>).
- What **Technical Standards** are you using? Offer details. For example, if your project involves scanning images, describe the type of scanner, format, resolution of the scan and image on the site. The same applies to standards for audio, video or other formats you include.
- Discuss relevant issues related to security and backing up.
- Briefly explore **design** issues relevant for computers as well as portable devices, such as mobile phones and tablets.
- Discuss any relevant **Ethical Issues**, such as Privacy, classified materials, cultural sensitivity
- Briefly describe the **Intellectual Property** of primary source materials
- Briefly outline your plans for marking **Intellectual Property** on the site (open access, creative commons, copyright, watermarking, etc.).
- How would you assess the digital project? Discuss qualitative and quantitative **assessment measures**.
- Does the DCP have any **other benefits** (social, political, etc)?
- Briefly discuss from a theoretical and practical perspective any issues related to **curating** content (who would curate the content, controversy, objectivity, budget).
- Discuss the DCP's **educational content**, and how it might be used by K-12 or post-secondary educators. What materials could make this more useful?
- How would you **promote** the site, including advertising and public relations?
- Discuss any **Social Media** aspects. For example, what are some possibilities for gaining interest from, or increasing appeal to, the public, e.g., gamification?
- Explore any relevant issues related to **accessibility**, including language, disabilities, etc.
- If your DCP involves the **private sector**, be sure to explore relevant questions such as branding and competitive advantage.

(c, 10-15 pages): **Sample Images of the proposed collection** with an emphasis on content and intellectual property issues. This section should include either sample pages from a real digital project you created or a mock-up of a few sample pages, showing such issues as typography, organizational branding. In addition to the mock-up, you should include:

- Briefly map out a sample Web Architecture, using at least two **website wireframes**.
- Include a brief narrative on any design decisions and why you made them, including relevant standards. Some key design questions include colors, fonts, and layout.

(d, 1 page): **Budget-Spreadsheet**. I encourage you to do this on Excel or other spreadsheet. Be sure to calculate for projected costs including hardware, labor (e.g., website designer, student help...), software, and External hosting (if relevant). I do not penalize or reward you for going over/ under budget, but want you to reflect on the realities of real budgets.

(e, 2-3 pages): **Budget-Narrative**: This should explain aspects of the budget, such as equipment already on hand. Do not use this space to list individual prices.

(f, 2-4 pages): **Summary**: This should include the limitations of the collection and propose further growth areas. This should also summarize the core of your collection. You should also use this section as a sales pitch to emphasize the value of this collection to your institution.

SUBMISSION INSTRUCTION:

Save your DCP Portfolio as **615_CMP_YourLastName.doc** and send it to Dr. Wertheimer as an MS Word document attachment using Laulima's mail function.

Evaluation

Your portfolio will be evaluated on the following criteria:

a) Institutional Description of the client (institutional profile, user's demographics, and existing collection) is rich with relevant and varied and cited data. This section includes responses to suggestions made in the DCP Proposal. A perfect score shows original writing that builds on authoritative information that would be convincing to a funding agency.	2 points
c) Professional presentation of your DCP, including aesthetics, the cover page, typography, margins, and following all instructions.	5 points
d) The Summary is well written, persuasive, and reiterates points made in the profile, parameters, and in the mock-up. It explains the value of this DCP to your institution and the potential impact on users. It also includes limitations of the collection and proposes areas for further growth areas	4 points
e) The Budget section is thorough and easy to follow. The narrative is well written. The budget follows the directions. It is clear at the citation level whether each item selected is paperback or hardcover. Budget calculations are correct, and contrasted with the proposed budget. One table presents (a) the Proposed Budget, (b) the Final Budget, and (c) the difference.	2 points
g) The Narrative Discussion on the DCP is clear, original, well written, and based on good research on relevant standards and best practices. This is the most important aspect, as it demonstrates your intellectual and practical learning as well as your ability to independently create such a digital project.	10 points
h) Sample Images of the proposed collection and outline of the site's digital architecture. The evaluation here is based on your ability to convey your plans for the project using digital wireframes and narrative text, including notations of design choices, digital architecture.	7 points
i) Overall Quality of the DCP. This section of your evaluation relates to the DCP as an entire project. Your project will be evaluated to see if it is able to reach its desired goals. For example, if you were creating a scholarly communications portal on Greek philosophy, but used Comic Sans as a font along with an emphasis on social media and blinking ads, you would not expect a high grade in this section. You also will be docked if you do not address ethical or technical issues that are problematic, such as digitizing sacred content without authority or classified intelligence. On the other hand, you can reach a good score if you have a unique project that meets the needs of the client, users, and is presented in a way that meets professional standards. You also need to be able to demonstrate this with evidence, such as a table showing how elements of your proposal specifically address the client's objectives and mission.	5 points

DCP STAGE 4: DCP Reflection Journal (10%)

The final portion of your **DCP** is perhaps the most important, since it is a reflective exercise. It consists of an 8 to 10 page journal in which you will evaluate the exercise as a personal reflection on the learning experience.

Your essay should first record (a) how you went about developing your digital collection and searching for models and standards, including specific indexes, databases, or other tools. This section should be brief yet concise, since this impacts your grade on the **DCP** itself. The second part is to (b) reflect on what you learned from the experience. If you think that you did not learn anything about the above, then you are strongly encouraged to do some research as part of your journal, as you will be graded on your reflections of the learning experience. Even experienced cybrarians should endeavor to make the DCP and Journal learning experiences.

(c) You should also reflect on weaknesses in the **DCP** (e.g., you had a hard time to create the mock-ups as you don't have experience with curating content or software). You should also (d) critique your own abilities as a collection manager, as well as the tools you used. You may add information, such as some discussion of reasons you made certain decisions, especially if you think I might misunderstand your decision-making process. For example, in a real context, how might you have worked with HCI experiments? You are encouraged to incorporate notes from readings, research, or class discussions in this section.

Do **not** waste your time or space by complaining that it was a long assignment. I already know it is time-consuming, but this is how we master the art of selection. I also use this in evaluating your DCP.

SUBMISSION INSTRUCTION:

Save your DCP Journal as **615_CMPJ_YourLastName.doc** and send it to Dr. Wertheimer as an MS Word document attachment using Lailima's mail function.

Evaluation

Your Journal will be evaluated on the following criteria:

a) Reflective Narrative explanation of how you mapped out your topic, digital architecture, found appropriate standards, made design decisions and other judgments you made while creating the DCP.	3 points
b) Critical Reflection on digital collection standards, platforms, CMSs, and access issues, including the role of metadata.	3 points
c) Critical Reflection on your DCP's strengths and weaknesses. How could it have been improved? What did you do that worked or what would you have done it differently?	2 points
d) Critical Reflection on yourself as a digital collection manager. Using the text and lecture materials, how have you grown as a selector, and what can you do to improve your abilities as a selector?	2 points

OPTIONAL EXTRA CREDIT (LIMIT: 2 extra credit projects per student only)

Possible extra credit projects include a report on presentations or professional conferences related to CM or some professional project (e.g., internship, presentation, paper, book review) as long as you are not getting credit for this in another class. Consult with me regarding alternatives. Please write up and post your extra credit work at the Laulima site. The two extra credit projects can only help your grade go from A- to A or other steps.

Expectations for All Assignments

Plagiarism, if caught, will result in failing the class. It also will be reported to the department for appropriate action. Please don't do it.

As a review, any quotes should either be placed in quotation marks or block quotes for longer extracts. You may use any recognized citation style (Chicago, APA, ASA, MLA) to cite sources of quotations or other information as long as you are consistent in doing so, and that you **cite the specific page**. If you will be citing the same source (such as in the article critique), then I suggest you use parenthetical references such as the MLA style. For example, you can write (Daniels 2012, 15), or (Daniels 15) if you have only one citation by Daniels, or (15) if you only cite one article.

Bibliography

For papers using parenthetical references, you need to submit a bibliography of works cited. You do not need such a bibliography, however, if you use complete citations in footnotes. Information from personal conversations, letters, e-mail, and Internet or database-derived content should also be cited with the date.

Limit Your Quotations

In addition to being careful with citations, you should limit the number of times that you use quotations except for interviews. Quotations should be selected for narrow specific purposes such as showing an author's language or demonstrating precise definitions. Quotes should not be used simply as if they were your own words to make your argument. You will lose points if your paper becomes a collage of others' quotations.

Contextualizing Your Information

Any time that you introduce a quotation or information, you should preface it with some information about the source. For example:

In a *Library Journal* interview, Flushing (NY) Branch Librarian Esther Y. Cheng claimed, "..."¹

This context shows the reader the credibility of the source and its value.

Long/ Block Quotations

You should not have many quotations that are over 2 or 3 lines long. Any such "long quotation" (more than 1 sentence) should be placed in a **block quotation**, which does not use quotation marks or italics, but should be single-spaced and indented on both sides, along with full citation.

Formatting

Use 12-point Times font and double-space your written assignments and leave a 1-inch margin on all sides. Footnotes and block quotations should be single-spaced. Papers should also be stapled. Assignments under 10 pages should not have a cover page, but should include your name, the date, and assignment name, my name [Professor Wertheimer] and class [LIS 615] (all single spaced) on the first page of all materials. Assignments 10 pages or more should have a cover sheet. Pages following this should have your name in the header. Each page should be paginated (except a cover page, which does not get counted).

Papers should be spell-checked and proofread. My interest is to see that you follow the instructions and are able to develop a logical, analytical, well-written paper, and provide evidence for your observations.

Titles and Headings

You also should use a descriptive and unique **title** for each paper. These help writers to establish a focused theme. You are also highly encouraged to use a few section headings on larger papers to organize your thoughts.

Papers are due at the start of class. One point per day late will be subtracted from **overdue assignments** (starting with the time papers are handed in). No overdue assignments or extra credit projects will be accepted after final class meeting date.

Note Taking

There may be one or more quizzes or exams in class. These would be reflected as a part of your participation score. (See Participation for more on this.)

You should take good class notes of lecture and discussion. I do not usually make copies available of PowerPoint lectures (My main exception is for ESL students, who can download the slides from the computer immediately after class). I do this because studies have shown that note taking dramatically increases your memorization and keeps you more mentally involved in class.

Sample Papers

Sample papers are posted online at:

<http://www2.hawaii.edu/~wertheim/615Samples.html>

Fellow students kindly shared papers from previous years. These are model papers. You are advised to review these papers to see how they presented their papers; however, **I change assignment requirements each semester, though, so be sure to follow your syllabus in terms of instructions as I will evaluate you based on the new criteria.**

If you write an exceptional paper, I might ask you to submit your paper to this page. If so, I would appreciate if you would try to follow up on some of the corrections/ suggestions I made, and then e-mail me your paper as a Word/ HTML/ PDF file attachment. I count revised and submitted papers towards your extra credit score.

Grading

General Grading Criteria:

Specific grading criteria are mentioned in the instructions for each assignment, but in general I like to reward papers that are well-written, well-researched, creative, and show me that you are integrating questions from this class and your real life experiences and readings from relevant professional literature.

Part of demonstrating professionalism includes using LIS terminology when appropriate. I also am happy if you can tie theoretical issues to the larger world as long as this supplements your LIS readings (not in lieu of them). I highly value critical thinking. Do not take everything you read or hear as truth.

Grading:

I hope that you will focus more on learning and experience than your grade in this course.

Grading Scale:

100-99 A+,	98-94 A,	93-90 A-;
89 - 87 B+,	86-83 B,	82-80 B-;
79 - 77 C+,	76-73 C,	72-70 C-;
69 - 67 D+,	66-63 D,	62-60 D-.

Professional Expectations for Library and Information Science Graduate Students at the University of Hawaii

Students should familiarize themselves with the professional code for LIS students, which may be found on the LIS Program website.

Student Learning Outcomes

In 2017 the LIS Program revised Student Learning Outcomes and indicators. The new approach is designed to prepare the way for students to demonstrate their SLO learning as part of an e-portfolio using work from class. Under this SLO plan, students can demonstrate their mastery of **SLO 3 (Resources)** using either the Collection Management Project or Digital Collection Prospectus in the e-portfolio presentation.

This course also deals with content related to other SLOs, but only SLO3 can be met from this course.

LIS Research Methodologies

Research is an important part of the work and expertise of modern LIS professionals. This course utilizes the following research methods, as selected from “**Qualitative and Quantitative Research Methods Taught and Utilized in LIS Program Courses**”:

- (1) Action Research (3) Case Study
(8) Ethnomethodology (18) Needs Assessment

Explanation: In 2007 the LIS Program decided to make explicit the research agenda in our program, so students can chart their own development as researchers – both as graduate students and as future LIS professionals.

Course Learning Objectives

This is an introductory core course, enabling students to:

1. To identify and assess accurately the needs for library materials and resources demonstrated by understanding users and nonusers of libraries, as well as the universe of knowledge.
2. To become familiar with the general organization and practices of the publishing and information industries, broadly conceived, as they relate to libraries and society at large.
3. To learn to apply appropriate principles and standards in the selection of library resources.
4. To evaluate print and electronic library collections and to recommend alternatives for specific situations.
5. To gain a general overview and a working knowledge of the processes of acquisition of library resources, including the antiquarian book market.
6. To gain practical experience in preparing a grant proposal, then developing a model collection.
7. To gain experience in critical and persuasive writing, and public speaking on relevant professional concerns.
8. To develop a critical understanding of the elements of a good review by writing a publishable book/ material review and by becoming a critical user of credible online and printed review sources.
9. To become more familiar with the practical and ethical dimensions of intellectual freedom as they relate to library collections.
10. To understand various aspects involved with digital libraries and digital archives, including the importance of relevant standards and ethical issues.

It would be impossible to learn everything there is to know about collection management (CM) in one semester. It is even more difficult to forecast the skills needed to manage collections in the future as technologies and markets change.

CM is made up of a series of skills that are learned over a lifetime of reading and professional experience. This course though may be your only formal instruction on the topic. With that in mind I hope that when you complete this course you will feel confident about your ability to actually do practical CM. I also hope the class will leave you with some theoretical concerns related to CM that will guide you throughout your professional career. I also hope it will encourage you to critically reflect on the role libraries and information play in facilitating democratic discourse.

Teaching Method

Class-time instruction will be a combination of lectures, guest lectures, student presentations and group discussions. Oral and written assignments, such as case studies, are designed to promote critical analysis and reflection on readings. Assignment due dates are indicated on the course schedule. Attendance and constructive participation are required. Some assignments will appear readily applicable to your first days of professional work, while the majority of assignments will lay the foundations for more advanced understanding. Lecture dates, readings, and guest speakers are subject to change.

Course/ Teaching Philosophy

My personal and professional ambition is to facilitate your learning, so I welcome specific or rough proposals for **alternative** learning experiences to assignments (preferably during office hours). I reserve the right to reject them or offer counterproposals. If you want to pursue this, please consult with me well in advance of the deadline of the assignment you want to replace.

Assessing Participation

Your **Class participation (5%)** will be calculated based on a combination of the following:

(1) **Attendance.** At the very minimum, this means coming to class on time and staying for the entire period. If you were late or absent because of illness or another emergency, please submit evidence. You should notify me in advance of excused absences (via mail in Laulima), if possible.

(2) There may be one or more unannounced in-class **quizzes or take-home exams** during the semester. These may be given at any point of the semester at any time (i.e., start of class or end of class...) *without advance warning*. These cannot be made up unless the absence was excused before class. Exams or quizzes could cover *any* assigned readings or content from class lectures, guest speakers, or discussions. (Since we use two textbooks, you will be given a choice of quizzes based on your textbook). Quizzes may be true/false, multiple choice or short essay questions. The best way to prepare for them is to keep up with readings and to pay attention to Collection Management terms and ideas.

(3) **Active participation** in classroom discussion. This does **not** mean monopolizing discussion, but rather means being prepared (especially having reflected on the readings due for that class), as well as actively contributing to discussion. You may be penalized in this section for any activities that disrupt class, such as tardiness, monopolizing class discussion, disrupting class or group-work or class, especially with irrelevant comments.

(4) You will be expected to post an **online journal** with original reflective comments related to the reading or topic of collection management. This will be a major part of your participation score. This should be posted each week indicated on the syllabus *one hour before class begins*. Please see the deadlines in the syllabus. Your posting need only be a paragraph long, but should be both original and substantial. Postings done during or after

class will be considered late, and penalized appropriately.

Your postings will be evaluated at the end of the semester on the basis of: (1) originality; (2) evidence of critical reading of the text and lecture notes; and (3) overall logic and writing.

You are welcome to bring a **laptop** to class, but it should be used to supplement your learning, such as for taking notes or looking up references made during class. I will subtract points from your participation score if you seem to be lost in e-mail, social media, gaming, or papers, etc., since that means you are not fully present in class.

Please mute your **cell phone** during class unless you need to be on call or are expecting an emergency. Ringing phones and pagers, and especially talking on the phone, are highly disruptive to the classroom environment.

As a graduate class, I should not have to remind you that arriving late to class, absenteeism, chitchatting with your neighbor during class is disruptive, and will result in a lower participation score.

On the other hand, I realize that our class is nearly three hours long, so I understand if you have to quickly go to the restroom. Please do so quietly, and return with minimum disruption. This, of course, is not a time to chat or pick up coffee.

Group Work

At least one assignment is designed as a group project. This is because group members can learn from each other while working towards mutual objectives. Another rationale is that libraries rely greatly on work managed by committees and other cooperative efforts. For group work to be effective, each member needs to participate actively, and be invested in the final outcome. For class the primary rewards are, of course, grades and learning. Assignment instructions show if they are individual efforts or group endeavors. Group assignments may include a segment in which you will evaluate the performance of each team member. This will influence that student's grade in relation to the grade for the group.

It is unfortunate, but possible that some students will not “carry their own weight” on group work. If your group has a member who is disruptive or is not doing his/ her share, you should first work with the student. If this remains a problem please contact the instructor. If the majority of your group wants to remove that member the instructor will contact the student. This student will then have a chance to appeal to join another group or complete another project alone.

Kokua

If you need reasonable accommodations because of the impact of a **disability**, please [1] contact the **Kokua Program** (V/T) at 956-7511 or 956-7612 in Room 013 of the Queen Lili'uokalani Center for Student Services; [2] speak with me privately to discuss your specific needs. I will be happy to work with you and the KOKUA Program to meet your access needs related to your documented disability.

Created: 5 July 2017; **Revised:** 20 August 2017

APPENDIX 1:
“Evaluating Reviews and Selection Tools”

Amazon.com, *Books in Print Plus*, *Follett Titlewave*, etc. are all good sources for locating basic bibliographic information on books, as well as brief excerpts of reviews. HOWEVER, you should be careful using them sufficient for the CMP, especially in terms of evaluation sources for the first 15 items. You also should not limit your CMP to only a few tools.

Some online reviews simply include excerpts from longer reviews and may only come from certain journals. The problem is that some of these review sources are NOT reliable (For example, some review editors never found a book they didn't like). Amazon also includes personal reviews that can be by anyone.

The truth is that many librarians use these tools in real life, but most also have worked long enough to intuitively know which reviews are more trustworthy, and which are not. Most of you are not yet at this level understandably, which is why I am requiring you to do the extra work of looking for reviews. You should also be aware that some databases exclude books from publishers not distributed by the book vendor.

I should add that e-Journals are OK if they are respectable (peer-reviewed or published by a respected association, etc) like H-NET lists. You should discuss this in your CMP Journal if you use them. Your citation for this section should be complete so that I can tell where you located the source.

You can use abbreviations if you explain them somewhere in the CMP.

EXAMPLE CITATIONS FOR REVIEW SOURCES:

Example 1 (Review from newspaper or weekly):

Keith M. Richards, *NYTBR* [or *New York Times Book Review* if you did not explain abbreviations elsewhere], 23 July 2005: 5.

Example 2 (Review from a professional journal):

Joan Neko-Hanamagari, *Horn Book* [or *HB* if you explained abbreviations elsewhere], 24 (1975): 23.

Example 3 (Review from a scholarly online full-text website):

Andrew Lazzarre, review of *Twenty-Three Antelopes Each Wednesday*, 10 Aug. 2011. *_H-LIS_* (online journal published as part of H-NET at MSU, www.h-net.org/madeupreference=ok/you.get-the.idea.html. Accessed 20 Feb. 2017.

Example 4 (Review from full-text journal database):

Yukako Shurinago, rev. of *DANCING MY WAY TO NAGO: A SOCIAL HISTORY OF OKINAWAN DANCE THROUGH THE AGES*, *JAPAN QUARTERLY* 47 (1996). Accessed from EBSCOHOST DATABASE on 20 Feb. 2006.

If you get a review from an online source you should be specific -- using a style close to EXAMPLE 3 or 4, including when the review was written. In your notes you should also explain why you are using a review from Amazon or other source beyond traditional review sources. **You should treat all review sources critically** -- that is the purpose of the assignment. I will also understand if you cannot locate reviews for a few titles, especially for small press titles, (but will take away points if there are many such titles, ESPECIALLY if I can find them easily myself). There are certain topics that are not well covered by reviews.

I should add that your paragraph on each selected item should **NOT** consist of more than one sentence quoted from reviews. **Use your own words.** You may paraphrase a small amount if you have to -- as long as citation is clear and in standard citation style. I strongly encourage you to write me something about the reviewer or journal as evidence as to the authority of the reviewer regarding the subject. Just to be clear, you will fail the CMP if you simply copy and paste this kind of information!

FAQ:

1) Yes, you certainly may use Amazon.com, Barnes&Noble.com, Follett TitleWave, Books in Print Plus... to help you search for materials for your subject. You also can use OCLC/ WorldCat, library catalogs, publishers' catalogs or ANY of the tools we discussed in class.

I encourage you to try different tools. Becoming familiar with many resources is another part of the assignment, and something that you can reflect on when writing your CMP Journal.

2) You may also use BIP, Titlewave, Amazon, etc. and other online sources for pricing information. In fact, you are required to use online sources (such as www.abe.com, www.bookfinder.com) to locate prices for OP books if you will do retrospective collecting.

3) You may even use these databases to help you locate some reviews (in other words, if Amazon shows *Publishers Weekly* reviewed a book in 1995, you could look it up in *PW*).

***However, I will expect to see a variety of reviews beyond those featured by Amazon, EbscoHost and the like.

4) You also can do searches of full-text databases (such as *Academic Search Premier*) to locate reviews from scholarly journals. You should verify that pricing and availability information are correct. When using full text reviews, be sure to reflect on the time between publication time, review time, and the embargo period before an issue would be online.

APPENDIX 2:

The HoloHolo Review: An Online Review Source for Materials on Hawaii and the Pacific

Reviewer's Instructions

The *HoloHolo Review* (HR) is a project of Dr. Andrew Wertheimer and his University of Hawai'i at Mānoa Collection Management students to provide free reviews of books, magazines,

journals, databases, videos, and other library materials relating to Hawaii and the Pacific (including Pacific Islands, Asia, Australia, New Zealand, and the Pacific Coast of North, South and Central America). Reviews are written by LIS students at the University of Hawaii, but are also welcome from other LIS students and librarians.

Each review should be submitted electronically at the HoloHolo Review site (a wiki hosted by Wet Paint). If you cannot do this, please send a correctly formatted MS Word document to editor, Andrew Wertheimer at <wertheim@hawaii.edu>.

The average HR review ranges from 400 to 800 words.

Please be sure that your review includes the following.

Author's Last Name, First Name., *Book Title: Subtitle*. City of Publication, State or Nation: Publisher's Name (Publisher's Address if a small press), Year of Publication. Number of Pages, ISBN (hc for hardcover) or (pa for paperback or pamphlet). Price in local currency. Index (if indexed), Bib (if includes a bibliography) Illus (if includes photographs or other illustrations). Acid-Free (if acid-free paper).

Example:

WERTHEIMER, Andrew B., editor, *Gatun-Gatun: A Collection of Waka on Subway Travel*. Tokyo, Japan: Bakanecko Press (P.O. Box 5, Roppongi, Tokyo, Japan), 1998. x, 235p. ISBN 1-234-5678-x (hc), Y50,000. 1-234-5578-x (pa), Y10,000. Illus.

Your review should first give general reader an overview of the book's content. You should also give a brief (1-3 sentences) biography of the author, including professional affiliation, other published works, or any aspect related to the author's expertise. You are encouraged to mention if the author received any awards for this or previous publications (be specific).

The critical part of the review is to ask if the book delivers what the book sets out to be. If possible, you also should compare it to 2 or 3 other relevant works (give complete citations [author, title, publisher, year]. Be sure to praise unique contributions of this book or criticize shortcomings. Specific errors or biases should be highlighted as well.

Librarians are advocates for good binding, affordable prices, acid-free paper, good indexes, attractive illustrations, and even good writing. Be sure to comment positively or negatively on these aspects.

The last review element is to advise librarians on the book's worth. Try to avoid clichés, such as "recommended for all libraries," but you can "suggested for purchase by comprehensive Pacific collections." Do not hesitate to pan really poor books, but try to be fair with your review and don't make this dependent on whether you enjoyed the work or not. You should imagine other audiences who might appreciate or have a use for the book.

The final element is that all reviews should be submitted with the month submitted, name, and reviewer's affiliation. For example:

Submitted in May 2015 by Jiji Shurinago, LIS Student, University of Hawaii at Manoa.

Please see the online examples as a model in terms of style and content.