
About INLS 520

- Class meeting time: Thursdays, 11 - 1:45pm / Manning 307
- Office Hours: I'm happy to talk to you one-on-one! Make appointments via Calendly
- Hypothesis (Online Annotation) group
- "Work With Me" Appointment Link (one appointment for everyone who is working with me) via Calendly

Introduction

In this version of INLS 520, we will focus on fundamental concepts of organizing systems that transcend the particular implementations or professional contexts. We will not restrict ourselves to the traditional concerns of information science, narrowly defined, because organizing systems are not so restricted.

You will be able to use what you learn in INLS 520 in all information professions. INLS 520 will help you to understand, use, explain, create, assess, and interrogate any organizing system.

Although organizing systems are simple in the abstract, they become incredibly complex in practice. This is because organizing systems attempt to make an unruly, messy, and ambiguous world appear systematic and orderly—and, often, the world isn't having it. For INLS 520, this means that easy answers are impossible, and you cannot find refuge in following rules. But this is what makes organizing information fun—and fascinating.

Course Learning Objectives

At the end of this course, you will understand:

- Basic elements that constitute the structure and arrangement of organizing systems:
 - Things (entities, resources, items, ..).
 - Categories (attributes, dimensions, properties, elements, ..).
 - Values (terms, tags, descriptors, ..).
 - Relationships (between things, between categories, between values).
- The role of categorization in language and
- The ubiquity of organizing systems and categorization processes and their complex integration throughout our forms of life—social, cultural, scientific,

- The inherent instability, ambiguity, and arbitrariness of any organizing system.

At the end of this course, you will be able to:

- Design an organizing system.
 - Implement an organizing system
 - Explain how others should implement it.
 - Assess an organizing system.
 - Explain an organizing system.
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Required Text

There is no required text for this course.

Course Structure

This has been designed as an in-person course, meeting once a week for two hours and forty-five minutes.

Our time together will be oriented around discussion. Generally, the first half of class will focus on the week's assigned readings, while the second half of class will be oriented around practical dilemmas and debates—what-if scenarios, analysis of current events, and ongoing professional challenges related to the week's theme. I have posted lectures for each week of class, and students will be responsible for watching those lectures before class that week. In an attempt to repay that time to students, I will attempt to end class by 30 minutes early so that students may use that time to watch next week's lecture, or to work on their assignments.

This class will use the Canvas learning management system.

The Semester Calendar (in the modules below) provides an overview of each week.

Grades

I believe that grades are harmful to the learning process. In an attempt to alleviate stress and allow for more equitable grading, I have instituted a system that I believe honors what I think is valuable about the learning experience: that is, engaging with the material and with your colleagues.

Basic expectations:

All students are expected to participate in class discussions to the best of their ability, and to attend class consistently. However, I do not take roll, and I do not have a metric for "grading" a student's participation. If it gets to the point where I notice and feel resentful that students are not participating in class discussion, or attendance becomes embarrassing, we - as a class - will have a discussion about what that means in terms of the learning environment.

There are two metrics for assessing student success in this class.

1. [Mutual Aid Points](#)
2. [Assignments](#)

Graduate Student Grades:

To get a **P** in this course, graduate students must:

- Accrue 6 mutual aid points.
- Complete the Descriptive Schema, Taxonomy and Comparison Assignments to a minimum level of expectation (that is: students must follow the instructions, turn in all of these assignments, and include all components of the project in their deliverables).

To get an **H** in this course, graduate students must:

- Accrue 10 mutual aid points.
- Complete the Descriptive Schema, Taxonomy and Comparison Project to a minimum level of expectation (that is: students must follow the instructions, turn in all of these assignments, and include all components of the project in their deliverables).

To get an **L** in this course, graduate students must:

- Accrue 6 mutual aid points.
- Not complete the descriptive schema, taxonomy and comparison assignments to a minimum level of expectation (this is unusual, but this is a situation where a student does not follow the instructions on an assignment, and I ask them to re-work that assignment to meet a minimum level of expectation and they never turn in the improved assignment). Students can do this for one (1) assignment. If this happens for two assignments, they will receive an **F** in the class.

Undergraduate Student Grades

In order to get a **B+** in the course, undergraduate students must:

- Accrue 6 mutual aid points.
- Complete the Descriptive Schema, Taxonomy and Comparison Project to a minimum level of expectation (that is: students must follow the instructions, turn in all of these assignments, and include all components of the project in their deliverables).

In order to get a **A-** in the course, undergraduate students must:

- Accrue 8 mutual aid points.
- Complete the Descriptive Schema, Taxonomy and Comparison Project to a minimum level of expectation (that is: students must follow the instructions, turn in all of these assignments, and include all components of the project in their deliverables).

In order to get a **A** in the course, undergraduate students must:

- Accrue 10 mutual aid points.
- Complete the Descriptive Schema, Taxonomy and Comparison Project to a minimum level of expectation (that is: students must follow the instructions, turn in all of these assignments, and include all components of the project in their deliverables).

As should be relatively obvious at this point - the only way to excel in this class is to engage with your peers in a way that adds value to the class. **Students must accrue 6 mutual aid points to pass this class.**

Work that does not meet minimum standards of expectation - meaning the student did not follow instructions, or they turned in incomplete work - will generate a lower grade. Students will be asked to follow up on this work, and if they improve the work to meet minimum standards, that's great, they're back on track. If they never turn in the work, or the work never meets minimum standards, grades will go down one full letter grade.

If this happens with one (1) assignment (meaning, essentially, that it's missing and / or incomplete) by the last day of class, students will receive a **C+** / two or more assignments will receive an **F**.

Ways to get a grade lower than a P (for graduate students) or B+ (for undergraduates)

- This class is small enough that I will notice when someone is not coming consistently. Missing more than a quarter (roughly 4 sessions) of the class will require a conversation with me.
- If there's been a misunderstanding of an assignment, or I believe that a student has not followed the directions, or they have not otherwise completed the assignment to a "minimum expectation," I will typically ask the student to re-

submit that assignment. If I ask a student to re-submit an assignment and they do not, that will lower their grade. If that happens once (for a graduate student) the resulting grade will be an L; for an undergraduate student, this will result in a C+, If this happens twice, the student (graduate or undergraduate) will receive a failing grade in the class.

Course Policies

Keep in Mind

Email Policy

It's very difficult to explain course material via email. If you need help with course content or assignments, the first step is to make an appointment for office hours, which are always online, and can be made here: <https://calendly.com/megan-winget/15min> [Links to an external site.](#)) I love to receive emails that share interesting information (videos, news as it relates to class).

Academic Honesty

Academic honesty and trustworthiness are important to all of us as individuals and are encouraged and promoted by the honor system. More information is available at <http://www.unc.edu/depts/honor/honor.html>. [Links to an external site.](#) The web site identified above contains all policies and procedures pertaining to the student honor system. We encourage your full participation and observance of this important aspect of the University.

Late work

There are no penalties for late work. I do ask, however, that if you have to turn in your assignments more than 2-3 days late, please let me know when you think it will be in, and any plans you have for finishing it before the end of the semester.

Covid Policies

- Once we return to face-to-face instruction, it is likely that some of us may get sick, whether with COVID or with more “normal” things like colds and the flu. **If you are feeling unwell, please do not attend in-person classes.** The lectures are online, you will miss the discussion but the scribes will hopefully provide notes on interesting topics and ideas we trade in class.
- If more than 25% of class (in this class that means 5 people) is are out sick while we will have a discussion about how the class would like to handle that. We may continue meeting in person, we may decide to go online for a week or two. If more than 50% of students are sick, we will need to go remote for the following two weeks, with weekly check-ins on whether to return.
- If I get sick, or if anyone in my family is sick and I am their caregiver, I will have to switch the class to online-synchronous.

Services and Student Support

Please utilize me as a resource if you are having difficulty with the material or there are outside circumstances impeding your ability to learn (for example, housing insecurity, food insecurity, emotional insecurity, or need physical or mental health services). **You should also know that I am a mandatory reporter if you choose to confide in me.**

Mental Health: "CAPS is strongly committed to addressing the mental health needs of a diverse student body through timely access to consultation and connection to clinically appropriate services, whether for short or long-term needs." Go to their website: <https://caps.unc.edu/> [Links to an external site.](#) or visit their facilities on the third floor of the Campus Health Services building for a walk-in evaluation to learn more. (source: *Student Safety and Wellness Proposal for EPC, Sep 2018*) - I understand that some students have had negative experiences with CAPS. My recommendation is that students can use CAPS as a resource for referrals to professionals in the area who take student insurance.

UNC Peer2Peer: <https://www.uncpeer2peer.com/> [Links to an external site.](#) "Peer2Peer is an organization that promotes free one on one peer support for UNC students. Our Peer Responders are here to listen and support individuals, especially during these uncertain times. We hope with the diverse range of experience, backgrounds, and topics of interest, our Responders are able to provide a peer perspective."

Heels Care Network: <https://care.unc.edu/> [Links to an external site.](#) "The Heels Care Network website is a place for all Tar Heels — undergraduate, graduate and professional students, and post-docs, as well as faculty and staff — to come together in support of each other and access the many mental health and well-being resources at Carolina."

Basic needs security. Any student who faces challenges affording groceries or accessing sufficient food to eat every day, or who lacks a safe and stable place to live, and believes this may affect their performance in this course, is encouraged to contact the Office of the Dean of Students. Furthermore, please notify me if you are comfortable in doing so. This will enable me to provide other resources I may know of. Other resources you may find helpful:

- [Student Support: Office of the Dean of Students](#)[Links to an external site.](#)
- [Carolina Cupboard: Community Food Pantry \(on-campus\)](#)[Links to an external site.](#)
- [Groceries for Neighbors in Need](#)[Links to an external site.](#)
- SILS food pantry: The SILS break room (on the second floor) is stocked with food and hygienic supplies for all students.

Accommodations: The University of North Carolina at Chapel Hill facilitates the implementation of reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability, or pregnancy

complications resulting in barriers to fully accessing University courses, programs, and activities. Accommodations are determined through the Office of Accessibility Resources and Service (ARS) for individuals with documented qualifying disabilities in accordance with applicable state and federal laws. See the ARS Website for contact information: <https://ars.unc.edu> [Links to an external site.](#) or email ars@unc.edu.

Title IX: Any student who is impacted by discrimination, harassment, interpersonal (relationship) violence, sexual violence, sexual exploitation, or stalking is encouraged to seek resources on campus or in the community. Please contact the Director of Title IX Compliance (Adrienne Allison – Adrienne.allison@unc.edu), Report and Response Coordinators in the Equal Opportunity and Compliance Office (reportandresponse@unc.edu), Counseling and Psychological Services (confidential), or the Gender Violence Services Coordinators (gvsc@unc.edu; confidential) to discuss your specific needs. Additional resources are available at safe.unc.edu.

Diversity & Inclusion: My intention as an educator is to provide a safe and inclusive environment for all learners. I work hard to include course materials and activities that promote diversity but Information & Library Science (and most disciplines in the academy) were founded by those from a privileged background. As a cisgender, straight, white, able-bodied woman, my standpoint may exclude important points of view. It is also possible that I will make unintentional mistakes. If this happens, please come, and speak to me directly. I promise to acknowledge your concerns as valid and learn from critiques. Likewise, I'm always looking for new scholarship by women, BIPOC, LGBTQ+, and non-Western thinkers – please share resources you think would be useful. Suggestions and improvements are encouraged and appreciated.

General Description of Assignments

Due dates are "best-by" dates. If you're going to be more than 2-3 days late, please let me know that everything's okay and a plan to turn in your work by the end of the semester.

There are four assessments in this course:

- Participation & Mutual Aid
- Schema
- Taxonomy
- Comparison of organizing systems

Participation & Mutual Aid

Be excellent to each other

The class will be mostly based around discussions, in-class activities, and project work, with relatively few lectures. Class participation is a vital component of the course.

Our time together will be oriented around discussion and group work. Generally, the first half of class will focus on the week's assigned readings, while the second half of class will generally be oriented around project work. I expect everyone to participate in our discussions to the extent possible, and participation in these discussions must be respectful, well-reasoned, and should demonstrate knowledge of the topic (and/or the readings). This kind of participation is integral to the success of this class **and** will not be formally assessed. My expectation is that because we all want to have a successful, interesting, engaging class – each of us will do our best to participate in the discussion.

Some guidelines for successful discussions

Excellent participation typically involves these characteristics:

- Being prepared for synchronous class sessions.
- Enacting a non-judgmental space.
- Demonstrating engagement and attention.
- Supporting each other in mutual learning and growth.
- Exhibiting patience, flexibility, and respect for others.
- Showing interest in others' ideas, experiences, and values.
- Having the courage to embrace discomfort (perhaps by speaking up, perhaps by being silent; perhaps by offering constructive criticism, perhaps by receiving a response gracefully).
- Taking responsibility for our mutual mastery of the course material.

Some of the ways that we can achieve excellence include:

- Getting through the materials for each unit (readings, lectures, activities) before class.
- Attending class.
- Taking the time to participate thoughtfully and deliberately; not being afraid of awkward silences.
- If it's hard for you to speak, make an effort to try it; if it's hard for you to keep quiet, make an effort to listen ("step up/step back" according to your own strengths and challenges).
- Using active listening techniques during class, so that, even when muted in Zoom, it's clear that you are paying attention (for instance, gestures, reaction emojis, chat).
- Demonstrating flexibility and graciousness in the face of technical breakdowns and other distractions.
- Taking advantage of alternate modalities (in Zoom, chat and breakout rooms; forums in Sakai).
- Acknowledging and encouraging the contributions of others; letting people know that you want to hear them (for instance, asking open-ended questions, referencing what others have said, learning each others' names).
- Taking responsibility to ask questions or get help when necessary.
- Approaching disagreement respectfully.
- Providing constructive and useful feedback for project peer reviews.

Again, I'm just going to assume that everyone will participate in the discussions to the extent possible. I don't have a list with checkmarks to see who is talking and who isn't.

I've recently been thinking about why I think participation is so important, and how to more equitably "grade" students on this very subjective metric. I've realized that participation is important because it's an element of community, and I definitely think building community is important. So I've come up with a way to measure participation in a way that's more equitable and perhaps will have a greater impact on the class. I'm calling this new form of participation "mutual aid"

Mutual Aid Points

At the end of the semester, students will be asked to give themselves points based on the ways they take care of each other in class.

Some examples of how to get mutual aid points:

- **Scribes:** Every class, we have two notetakers who will come together and post their notes online. This will include keeping track of discussion, finding any links mentioned in discussion, and providing an overview of upcoming due dates.
- **Timekeeper:** I will post the "Script" for a class session up with the timing of each step at the beginning of class, and this person will help me stay on-time. I'll ask at the beginning of class who wants to be the timekeeper. First to answer gets the job that week.
- **Class Contract:** Participate in making a class contract for shared expectations for how we all want to be treated (this is facilitated in the first two classes)
- **Work with me:** This involves doing the reading, thinking about it, and meeting with me before class (15-30 minutes) to have a brief discussion about what the class discussion questions might be. If class is on Tuesdays, best meeting day is Monday, but I'm flexible. Two people per class session.
- **Suggest readings.** If you know of an interesting reading (or ethical standard that I've missed) please let me know via the "Suggested Readings Discussion Board" and I'll look it over and may add it to the syllabus next semester!
- **Write a letter to future students:** on the last day, write a letter to next semester's students with tips and tricks for navigating the course (& my teaching/grading style) you wish they knew at the start.
- **Annotator:** Many people read texts better when they are marked up with highlights, definitions, notes, etc. Students will annotate via the hypothesi.is web app. All of the PDF links to documents on this site can be annotated through this process. This process will require students to 1) download a bookmarklet or chrome extension from hypothesi.is; and 2) create an account with hypothesi.is. Additionally, in order to get credit, BEFORE annotating, students will need to join the annotation group. The URL for this course's annotation group should be on the home page for this course. Directions are here: <https://web.hypothesi.is/quick-start-guide-for-students/>
- **Discussion group reporter:** volunteer to take notes in the breakout rooms / small-group discussions and then report back for the group when we return to the main room.

- **Unanticipated awesome person:** Do something that helps your peers that this list did not anticipate. I am sure that we will have more items for the list every semester.
- **Perfect Attendance!** Remember how gratifying it was to have perfect attendance in elementary school? Here's your chance to get that same warm fuzzy feeling again! (self-reported)
- **Sharing is Caring:** If you're out in the world, reading stuff, looking at TikTok, reading some article somewhere and it seems relevant to this class, share it on the "Sharing is Caring" Discussion Forum! Students will get a point for sharing an article and/or commenting on a post where someone has shared an article.
- **Shiny Happy People:** While I'm not grading participation, I will give points to students who I believe are helping to make large group discussion interesting and engaging. I will contact students who have gone above and beyond normal discussion expectations.

Students will keep track of their mutual aid points throughout the semester and provide a review at the end of class. I will not be keeping track of these mutual aid points! Minimum level of expectation will be 6 points. Students must accrue 6 mutual aid points to pass the class.

(These ideas for grading mutual aid come from Dr. Max Liboiron on twitter: <https://twitter.com/MaxLiboiron> [Links to an external site.](#))

Descriptive Schema

Describing a set of things

In this project, you will define a set of things, detailing the set's domain, scope, and means for establishing that one item is different from another. You will then outline a structure of attributes and associated values to systematically describe your set of things.

Next, you will develop documentation to help someone else (not you) to use the schema to describe instances of the things in your set.

To assess your schema and improve it, you will use the schema to describe (i.e., create metadata for) five varied instances of the things in your set. In class, you will further assess your schema by having someone else use it to describe three things. After these assessments, you may decide to revise your schema or the instructions.

Finally, you will write a short essay that reflects on your experience developing and assessing the schema.

This project is NOT designing a database. Your project is merely to instruct other people how to describe a set of things in a systematic way. (A good database design requires this kind of conceptual thinking also, but this project is not specific to a database implementation.)

Project component 1: Your set of things

This part of your project includes three parts:

- Domain
- Scope
- Identification

Domain

You will *define a group of things* to describe. This could be anything: concrete, physical things, informational things, or abstract, conceptual things. Some examples that students have previously used:

- Spoons
- Historical sites in Beijing
- Programming
- Jerky
- Characters based on Sherlock Holmes in film and television
- Knitting
- Reality television
- Computer viruses
- Yoga poses.
- Visualization
- Representations of “the aztec” in popular culture.

As part of the domain, you will also articulate a *purpose* and associated *target audience* to motivate your description. For example, you might want to help novice knitters find patterns that make nice gifts, or you might want to interrogate stereotypes latent in “Aztec” imagery. Each situation will suggest a different set of attributes for the same set of things, so define the audience and purpose carefully.

Scope

Here you will clarify what is in, and what is out, of your set of things.

For example, is a yoga pose invented by your teacher a proper yoga pose? Is a ladle a spoon? What are central members of your set of things, and what are peripheral members? What doesn’t belong at all? Thinking about central and border cases will help you create attributes that apply equally to all members of your set of things.

Identification

Now that you’ve clearly defined your scope, you should be able to more precisely define your things.

This involves deciding on a level of *abstraction*: for example, are you organizing individual physical books, or abstract literary expressions that may be manifested in various forms and editions? Are you describing a specific package of jerky or all instances of a certain product?

You also need to think about *parts* and *granularity*: do your things have parts that need to be kept track of? Are your things themselves collections? What about the *persistence* of your things: do they change over time? How much can a thing change before it is no longer the same thing?

Explain how you will distinguish between two different things. Do they have some intrinsic property that you can rely on for identification? Will you need to assign identifiers?

Project component 2: Attributes, value parameters, and documentation

You will articulate a set of 10-15 attributes to define your things in support of your identified audience and purpose.

You will label and document each attribute in sufficient detail so that someone else can assign values for things of the type that you have described. For each attribute, you will set parameters for acceptable values and provide guidelines that show how values should be expressed.

Preliminary assessment

Once you have sufficiently defined your attributes, use the structure that you have developed to preliminarily describe five instances to represent both central and border cases of your entity set.

If there are cases where you are unable to satisfactorily describe an instance, use this as an opportunity to revise the schema and clarify your attribute definitions. (You might even need to clarify the boundaries of your group of entities and sharpen its description.) Then use your revised schema to create five final descriptions for your entity instances.

User assessment

You will further assess your schema by having someone else use it to describe three things.

We will do this in class, but you will include your assessors' results with your final submission.

Project component 3: Reflection essay

Finally, write a brief critical reflection on your design process and resulting product. You might discuss questions such as the following:

- Did designing the schema clarify or complicate any of the ideas we've been reading about in class?
- What was difficult about designing the schema?
- How did you decide which attributes to include in the schema?
- How do you know what makes an attribute good or useful?
- How do you know if you've defined an attribute well?
- What might you keep in mind when designing similar kinds of organizing systems?

These are *examples* of questions that you *might* discuss. To create a concise yet cohesive essay, you will need to concentrate on a few design issues of particular relevance to your project. *Do not merely answer the questions here.*

Note that the point of this reflective essay is *not* to justify why your schema is awesome. Clearly, it is awesome, and you don't need to persuade me of that. Instead, the goal of this essay is to explore how the practical experience of designing a schema provokes insight onto the conceptual foundations of information organization.

Deliverables

There are two components to this final deliverable:

1. Please copy and paste these questions into the text/comment area in the assignments turn-in area and answer the questions
 1. What set of things are you describing with your schema?
 2. Who is the audience for your schema? (If your audience includes the word "anyone" my recommendation is to focus your audience.)
 3. Please provide a brief (100 words, max) description of your primary user.
 4. What will that audience do with the schema? Please be as specific as possible.
 5. Provide a use case for your audience using your schema. 100 words, max.
 6. Please describe how you know when something belongs in your set of things, and when it does not belong?
 7. On a scale of 1-5 (with 5 being best), how well do you think each of your descriptive elements (for example: title, author, publisher) reflect the needs of the audience and the purpose of the schema?
 8. How did you incorporate the results of your peer evaluations into your final schema? (100 words, max)
 9. On a scale of 1-5 (with 5 being best) how well does your critical reflection consider the design process in terms of larger issues of theory and practice? (that is, the reflection does not merely summarize or justify the design process or product; it interrogates it).
2. One (1) PDF that contains your descriptive schema. This includes:
 1. The domain, scope, and identification information for your set of things.
 2. Your attribute descriptions, value parameters, and associated guidelines for using the schema to describe the things. The description for each

attribute should follow a consistent format. (You can use something similar to the NISO standard for Dublin Core metadata elements or devise your own format. You may use tables if you like)

3. Your descriptions of five instances. Use a consistent format for each record (perhaps a table for each instance).
4. The instance descriptions created by your peer.
5. Your critical reflection. This should be written in narrative form, as a cohesive paper of about 1000 words (3-4 pages).

Assessment criteria

A successful schema will exhibit these characteristics:

- The following are clearly described:
 - What constitutes a member of the defined set of things,
 - The schema's audience and purpose, and
 - How a thing should be identified and distinguished from other, similar things.
- The defined attributes effectively represent the selected things in the context of the described purpose, and the value space effectively represents the extent of the attributes.
 - For example, when describing yoga poses for students, an attribute that indicates level of difficulty might be appropriate. However, such an attribute might seem less appropriate if describing yoga poses in relation to the history of Hindu thought and culture. In addition, the values described for the potential level of difficulty attribute for yoga poses should encompass the full range of possibilities at an appropriate level of detail for the audience and purpose of the schema.
- The documentation is sufficient to describe actual things accurately and comprehensively within the context of the selected purpose.
- The critical reflection thoughtfully considers the design process, product, or both, using the experience of creating the descriptive schema to productively engage larger issues of theory and practice (that is, the reflection does not merely summarize or justify the design process or product; it interrogates it).
- All project components follow a logical document structure, are clearly written, and use correct grammar and usage.
- All the project components are present.

Taxonomy

Organizing a set of things

Project component 1: Taxonomy

First, you will decide on a property to organize your things. This could be an attribute from your schema or it could be a new property.

To create a worthwhile taxonomy, the property that you select must be complex enough so that its values can be arranged in multiple levels of hierarchy. You might need to play around with several ideas before making your final selection.

To begin, select a property that has between 10-15 specific values that can then be organized under more general categories.

Here are some examples.

- If your entity set was *yoga poses*, you might create a taxonomy of *skills* associated with each pose: for example, arm strength, open hamstrings, balance, breath control, mental presence.
- If your entity set was *spoons*, you might create a taxonomy of *materials*: teak, silver, plastic, bone, glass.
- If your entity set was *still-life paintings*, you might create a taxonomy of depicted *objects*: lemons, oysters, goblets, petunias.
- If your entity set was *gardening implements*, you might create a taxonomy of gardening *activities* that the implements are used in: weeding, insect spraying, harvesting, sowing, mulching.

We will work on creating the basic taxonomy structure in class, but here are the fundamental steps for a bottom-up design approach:

1. Identify 10-15 specific values—the ones that you would have specified in your descriptive schema.
2. For each value, generalize it into a broader category. From lemons, go to citrus, or fruit. From teak, go to wood. From arm strength, go to upper body strength. From insect spraying, go to pest control.
3. For each broader category, go up another level, until you get to your top term: skills, materials, objects.
4. Now comes the hard part. Arrange, redefine, remove, add, and relabel your categories so that they are organized into proper hierarchical relationships with a single principle of division at each level of the hierarchy. (We'll talk about what this means in class)
5. Ensure that your taxonomy follows good design practice for hierarchies: at each level, categories are jointly exhaustive and mutually exclusive, and at a similar level of abstraction. (You'll get a set of design principles in class)

Your final taxonomy should include from 25-40 categories, dispersed throughout all its levels. It should be at least four levels deep (the root term, two intermediate levels, and terminating values). Arrange your final taxonomy in a diagram that shows the relationships between categories. (There is no advantage to creating a fancy diagram.)

Project component 2: Taxonomy documentation

To enable someone else to use your taxonomy to categorize actual things, you need to define each category in your taxonomy and provide guidance about which kinds of things to put where.

Here are some issues that you need to think about:

- Can things be placed into higher-level categories or only at the bottom level? If things can go into higher-level categories, when might this occur?
- Can things go into multiple categories or just one?
- If a thing seems to fall in between or outside the existing categories, where should it go?

Your definitions should explain what the categories mean in the context of your taxonomy. For example, if you had a category of Bone to describe materials that spoons are made of, you would not transcribe the dictionary definition for Bone; that would be silly. You might write something like this:

Bone: Place here any spoons made of animal bone, tusks, teeth, or horn. Do not use Bone for spoons made from shells of marine animals.

Project component 3: reflection essay

Finally, write a brief critical reflection on your design process and resulting product. You might discuss questions such as the following:

- Did designing the taxonomy clarify or complicate any of the ideas we've been reading about in class?
- What was difficult about designing the taxonomy?
- How did you decide which categories to include in the taxonomy?
- How do you know what makes a category good or useful?
- How do you know if you've defined a category well?
- What might you keep in mind when designing similar kinds of organizing systems?

These are *examples* of questions that you *might* discuss. To create a concise yet cohesive essay, you will need to concentrate on a few design issues of particular relevance to your project. *Do not merely answer the questions here.*

Note that the point of this reflective essay is *not* to justify why your taxonomy is awesome. Clearly, it is awesome, and you don't need to persuade me of that. Instead, the goal of this essay is to explore how the practical experience of designing a taxonomy provokes insight onto the conceptual foundations of information organization.

Deliverables

There are two components to this final deliverable:

1. Please copy and paste these questions into the text/comment area in the assignments turn-in area and answer the questions
 1. What set of things are you describing with your schema?
 2. Who is the audience for your schema? (If your audience includes the word “anyone” my recommendation is to focus your audience.)
 3. Please provide a brief (100 words, max) description of your primary user.
 4. What will that audience do with the schema? Please be as specific as possible.
 5. Provide a use case for your audience using your schema. 100 words, max.
 6. Please describe how you know when something belongs in your set of things, and when it does not belong?
 7. On a scale of 1-5 (with 5 being best), how well do you think each of your descriptive elements (for example: title, author, publisher) reflect the needs of the audience and the purpose of the schema?
 8. How did you incorporate the results of your peer evaluations into your final schema? (100 words, max)
On a scale of 1-5 (with 5 being best) how well does your critical reflection consider the design process in terms of larger issues of theory and practice? (that is, the reflection does not merely summarize or justify the design process or product; it interrogates it).
 9. A summary of the set of things to be arranged with the taxonomy, and the audience and purpose associated with organizing these things (this may come directly from your schema project).
2. One (1) PDF that includes your taxonomy. This includes:
 1. A diagram that includes all the categories in the taxonomy and shows their relationships.
 2. Your taxonomy documentation, including general guidelines and category definitions.
 3. The category assignments made by your peer tester.
 4. Your critical reflection. This should be written in narrative form, as a cohesive paper of about 1000 words (3-4 pages).

Assessment criteria

A successful taxonomy will exhibit these characteristics:

- The taxonomy itself includes an appropriate number of categories, arranged in well-formed hierarchical relationships, that follow best practices for taxonomy design and development.
- The selected categories represent the set of things well in the context of its identified audience and purpose (from the descriptive schema).
- The documentation is sufficient to categorize actual things accurately within the context of the selected audience and purpose.
- The critical reflection thoughtfully considers the design process, product, or both, using the experience of creating the taxonomy to productively engage larger issues of theory and practice (that is, the reflection does not merely summarize or justify the design process or product; it interrogates it).
- All project components follow a logical document structure, are clearly written, and use correct grammar and usage.
- All the project components are present.

Comparison Project

Comparing organizing systems

In this project, you will write and create a zine (or other non-academic-paper product) that explains and compares, in detail, how a set of things is presented in two or three organizing systems in the real world. These should be systems that are available to the public (that is, not the sock drawer in your house). You may organize physical or digital items. Your explanation will have several parts:

- A explanation of the category structure in each organizing system and the kinds of items placed in each.
- An interpretation of each category structure that attempts to understand the ideas it communicates about the entity set.
- A comparison of the different ideas presented in each organizing system.

Your goal in this project is to understand how each organizing system interprets the entity set: how it gives the entity set a particular meaning. Your goal is not to assess the effectiveness of the organizing system for retrieval. It doesn't matter if it's easy or difficult for you to find items in the entity set.

The real-world things

To write a meaningful, detailed, incisive explanation, you will need to focus on just one part of each organizing system. That is why you will keep your analysis to one type of things within the system.

Here are some examples:

- The organization of light fixtures at Home Depot and Target.

- The organization of chips at CVS and Harris Teeter.
- The organization of mystery novels at Flyleaf Books and at Barnes & Noble.
- The organization of Legos at the Southpoint Target and online, via the Lego Website.
- The organization of Japanese woodblock prints at two different online resources.

As with defining an entity set to organize with your schema, you will need to identify a set of things that is specific enough to analyze in depth but broad enough to enable you to say something interesting about it. So the entire supermarket would be too broad, but just the Cheerios would be too narrow. The cereal at the supermarket might be just right.

Explanation of category structure

Your zine will need to explain each category structure that you're investigating. Let's say you're looking at the cereal in a supermarket. Here are the kinds of questions you might ask:

- What different kinds of organizing principles are at play in arranging the cereal? Are the cereals arranged by size, price, brand, primary ingredients, level of sugar? How are these principles deployed—are the most expensive items on the top shelves or the bottom shelves?
- What principles inform the selection of items within the category? How many different kinds of cereal are there? What kinds are represented the most, and what kinds the least?
- Can you define central and peripheral members of the set of "cereal" each supermarket, and on what basis can you make that determination?
- How is cereal related to other entities? What is next to it?

Note that your set of things might be split up into multiple locations within the organizing system: for cereal, there might also be cereal in the bulk section, or in the International section. You'll need to investigate these as well.

When you describe the category structure in your zine, focus on *explaining* it, not documenting it. There is no need to map out or transcribe each item in the cereal section! That would be silly. Your goal is to explain how the cereal section works, not to merely copy it down.

In creating your explanation, make use of the readings and class activities from throughout the semester.

Interpretation of category structure

This is the fun part. What does the category structure that you've explained tell us about the set of things? Here's an example.

Let's say my entity set is Noodles, and I'm looking at the Harris Teeter. Most of the noodles are in a section labeled Pasta that is near the tomato sauce. Indeed, based on the selection and arrangement of pasta varieties, the central idea of "noodle" is oriented

around the notion of spaghetti and tomato sauce as a common meal. However, not all the noodles are in the Pasta section. Rice noodles are with other “Asian” foods in the International section. These noodles are not near the tomato sauce. Rice noodles might be similarly shaped to spaghetti, but in the organizing system of the supermarket, they are far away from spaghetti. They are, in a sense, more Asian than noodle. They certainly do not appear to be interchangeable, based on their placement within the organizing system of the supermarket. There are implications to this: the supermarket is saying, in a way, that if you invited a friend over for pasta and served pad kee mao, your friend might be surprised. And yet, aren’t rice noodles also noodles? (If you were defining “noodles” as an entity set for your descriptive schema, would you have excluded them?)

(Probably not.)

While I encourage you to think deeply about the category structures that you’re investigating, *make sure to ground your interpretation within the evidence provided by your explanation*. You need to show how your interpretation arises from that evidence.

In making your interpretation, you should also make use of the readings we’ve done throughout the semester.

Comparison of different organizing systems

In comparing the two (or three) organizing systems that you are investigating, you might consider the following kinds of questions:

- What are the different ideas presented by each organizing system about the entity set? Are these ideas compatible or incompatible? (For example, rice at the Li Ming Global Mart is the foundation of one’s diet—it’s in its own section in 25-lb bags. But rice at the Harris Teeter is just an occasional companion)
- Would items from one organizing system take on a different character in the other organizing system? (For example, sugary cereal might be common at the Harris Teeter but uncommon at Whole Foods.)
- Would any items from one organizing system be excluded from the other system? (For example, spaghetti probably doesn’t appear at the Li Ming Global Mart, although there might be wheat noodles of similar shape.)

Deliverables

Your final assignment should include:

1. The 'zine, which you will present on the last day of class - and turn in a copy to me.

Zine details

Your explanations, interpretations, and comparisons should take the form of a zine, a brochure, graphic webpage, only limitation is your imagination. I want you to practice communicating complicated ideas in a limited space, while using images and normal

everyday language. A 'zine is This is a small magazine, with different sections, images, textures etc. There are typically 8 pages in a zine, but this does not equal the same number of words you'd have in an 8-page essay. Your zine should have a clearly identified argument and structure. For example, your theme might be "Noodles! Different things to different people!" or, "Cereal! More complicated than you might think!" or, "Have you ever noticed? Salad bars contain very little salad: based on evidence from supermarket buffets."

Although your zine needs to include your explanation of category structure, your interpretation of category structure, and your comparison of organizing systems, it does NOT need to put these into separate sections. You should structure your essay in the way that makes the most sense for your argument.

Peer review

In Week 14-ish, you will submit a draft of your final project for peer review in class. This is not the finished zine. This is the text / images you plan to put in the zine. Two people will be assigned to read your draft and provide written and oral/written feedback on it at the next class session in Week 15.

In your peer review, you will provide written answers to the following questions:

- What is the argument put forth by the zine?
- What is the evidence used to make this argument?
- What going well?
- How can the argument be strengthened?

You will give this feedback to the zine's author. (We will also discuss the drafts in class.)

Your goal in writing peer review feedback is to help make the argument better. Harsh criticism is not helpful; neither is mindless praise. Be honest, constructive, and compassionate. Also be a mindful and attentive reader: your feedback should not direct the writer to do things your way but help the writer to accomplish his or her goals more effectively.

Assessment criteria

A successful organizing system explanation will exhibit these characteristics:

- The zine has a clearly identified topic and argument.
- The explanations of each organizing system are adequate and cogent.
- The interpretations of each organizing system are insightful and well supported by evidence.
- The comparison of the organizing systems is insightful and well supported by evidence.
- Material from course readings and activities is usefully employed to extend the argument.

- The zine follows a logical structure, is clearly written, and uses correct grammar and punctuation.