UNIVERSITY OF WISCONSIN-MILWAUKEE
School of Information Studies

Course Syllabus

INFOST 750-201
Arrangement & Description in Archives
Fall 2018 – 3.0 Credits

Online
For Weeks 1-12 the course operates on a Thursday-Wednesday schedule
For Weeks 13-15, the course operates on a Monday-Sunday schedule
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INSTRUCTOR INFORMATION

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Office: NWQ 3495
Office Hours: 10 AM-1 PM / By Appointment (recommended)

CATALOG DESCRIPTION

This course allows students to develop the intellectual framework and critical evaluation skills necessary for the arrangement and description of archival collections.

PREREQUISITES

INFOST (L&I SCI) 650 – Introduction to Modern Archives Administration is a prerequisite for this course.

TECHNOLOGY REQUIREMENTS

This course requires only basic computer skills and access to the internet. Students will be required to install an XML editor and a web browser (that allows for access to D2L). No other hardware or software is necessary to complete this course.

For technical assistance related to D2L, contact the UWM Help Desk at https://www4.uwm.edu/technology/help/campus/. Or visit the online training and other resources that are provided via the UWM Knowledgebase (https://kb.uwm.edu/) and the Learning TECHniques (https://www4.uwm.edu/learningtechniques/ondemand/d2l.cfm).

METHOD OF INSTRUCTION

Lecture, Class Discussion, Homework, Assignments.

COURSE WORKLOAD

Per UWM guidelines, one semester credit represents a time commitment of at least 48 hours for the average student. Since this is a three-credit course, it amounts to a time investment of 144 hours in a 15-week semester or approximately 9-10 hours per week, which includes course readings, participation in online discussion, and preparation of written assignments.

CLASS LEARNING OBJECTIVES

Students completing this course will:

<table>
<thead>
<tr>
<th>Objective</th>
<th>Week/Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Understand the objectives and principles of information access, organization, and retrieval in an archival setting</td>
<td>W1-W14</td>
</tr>
<tr>
<td>2. Be able to articulate how archival descriptive practices relate to other archives and information studies practices</td>
<td>W6 A2</td>
</tr>
</tbody>
</table>

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3. Demonstrate knowledge of past and present descriptive concepts and practices
   W3, W4, W6, W7 A2, A4

4. Identify emerging concepts in, and approaches to, archival description and arrangement and be able to develop strategies for adapting to social and technological change(s)
   W8-W10 A3, A4

5. Evaluate archival material in light of ethical, legal, cultural, interpersonal, and moral tensions in preparation for processing
   W3, W5, W10, W13, W15 A2, A3, A4

6. Devise an arrangement and description plan for archival materials, taking into account limitations of resources and/or personal knowledge
   A4

7. Develop descriptive writing skills and basic metadata skills
   W1-W14 A2, A4

COMPETENCIES

ACRL Guidelines: Competencies for Special Collections Professionals
(http://www.ala.org/acrl/standards/comp4specollect#processing)

E. Processing & Cataloging

Special collections professionals provide for the processing and cataloging of materials in all formats that are under their care. Those with direct responsibilities in these areas achieve high-level technical skills and strong working knowledge of standards, practices, and tools. They establish effective working relationships with curators, public services staff, and the library’s main technical services unit to ensure good communication and sound technical services policies for special collections. They advocate for best practices in the organization and description of primary resource materials.

SAA Guidelines for a Graduate Program in Archival Studies
(http://www2.archivists.org/gpas/curriculum/arrangement-description)

Arrangement & Description

The intellectual and physical organization of archival records and papers in all forms, according to archival principles and institutional considerations, and the development of descriptive tools and systems that provide both control of and access to collections. Teaching methods and technology applications should link theory to practice.

TEXTBOOKS

This class does not have a required textbook. Readings will be book chapters, articles, and other assigned publications available online or through the D2L Course Site.

ASSIGNMENTS

In addition to weekly attendance and participation, this class will require the completion of four separate assignments that must be submitted to me (the instructor) via D2L. A brief review of these discussions follows but additional details about each one of them will be issued in class and are available at the end of this syllabus. The due dates and times for each assignment may be found on the next page and within each assignment prompt.
A1. Discussion & Mini-Assignments
Class attendance is measured through participation in online discussions and completing mini-assignments. Reading assignments given in advance of discussions are designed to facilitate active participation by providing a basic level of familiarity with the topic being discussed.

For additional information about this component of this course, see the Attendance & Participation prompt in the ASSIGNMENT PROMPTS & RUBRICS section at the end of this syllabus.

A2. Finding Aid Analysis
This assignment requires graduate and undergraduate students to conduct an in-depth critique of a finding aid of their choosing. It is that simple! For additional information about this component of this course, see the Finding Aid Analysis prompt in the ASSIGNMENT PROMPTS & RUBRICS section at the end of this syllabus.

A3. EAD Assignment
Graduate students will receive a sheet that contains numerous coding errors. Each student will be required to identify the coding errors and provide the correct solution. For additional information about this assignment, see the
EAD Assignment prompt in the ASSIGNMENT PROMPTS & RUBRICS section at the end of this syllabus. Undergraduate students are not required to complete this assignment.

A4. Final Project

For the course’s Final Project, you will identify a set of materials either in your possession or pulled from various archives. You will be expected to arrange and describe these materials with the framework of a specific set of given criteria. The assignment requires you to create a finding aid, use ArchivesSpace, and write a short essay. For additional information about this assignment, see the Final Project prompt in the ASSIGNMENT PROMPTS & RUBRICS section at the end of this syllabus. Undergraduate students are required to complete this assignment but have different parameters to follow.
ASSIGNMENT PERCENTAGES & DUE DATES

<table>
<thead>
<tr>
<th>Assignment</th>
<th>G - %/Points</th>
<th>UG - %/Points</th>
<th>Due Dates &amp; Times*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Discussion</td>
<td>20 / TBD†</td>
<td>30 / TBD‡*</td>
<td>Every Week</td>
</tr>
<tr>
<td>Finding Aid Analysis</td>
<td>20 / 40</td>
<td>20 / 40</td>
<td>October 11, 2018</td>
</tr>
<tr>
<td>EAD Assignment</td>
<td>10 / 15</td>
<td>--</td>
<td>October 25, 2018</td>
</tr>
<tr>
<td>Final Project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identification of Topic</td>
<td>10 / 20</td>
<td>10 / 20</td>
<td>September 27, 2018</td>
</tr>
<tr>
<td>Finding Aid</td>
<td>20 / 30</td>
<td>20 / 30</td>
<td>November 15, 2018</td>
</tr>
<tr>
<td>ArchivesSpace Record</td>
<td>10 / 20</td>
<td>10 / 20</td>
<td>December 13, 2018</td>
</tr>
<tr>
<td>Finding Aid as XML</td>
<td>5 / 5</td>
<td>--</td>
<td>December 13, 2018</td>
</tr>
<tr>
<td>Finding Aid Comparison</td>
<td>10 / 20</td>
<td>10 / 20</td>
<td>December 13, 2018</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100 / Irrelevant</strong></td>
<td><strong>100 / Irrelevant</strong></td>
<td></td>
</tr>
</tbody>
</table>

* All assignments are due by 8:00 AM CST.
† Although each week is scheduled to be worth 6 points, this value is subject to change if I determine that a discussion question or an assignment should be worth more/less than 6 points. Also, given the amount and quality of participation in previous weeks, I may decide to change the required amount of posts on a given week (e.g., only require a main post).

COURSE GRADING SCALE

<table>
<thead>
<tr>
<th>Points</th>
<th>Letter Grade</th>
<th>Points</th>
<th>Letter Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 – 96</td>
<td>A</td>
<td>75 – 73</td>
<td>C</td>
</tr>
<tr>
<td>95 – 90</td>
<td>A-</td>
<td>72 – 70</td>
<td>C-</td>
</tr>
<tr>
<td>89 – 86</td>
<td>B+</td>
<td>69 – 66</td>
<td>D+</td>
</tr>
<tr>
<td>85 – 83</td>
<td>B</td>
<td>65 – 63</td>
<td>D</td>
</tr>
<tr>
<td>82 – 80</td>
<td>B-</td>
<td>62 – 60</td>
<td>D-</td>
</tr>
<tr>
<td>79 – 76</td>
<td>C+</td>
<td>Below 60</td>
<td>F</td>
</tr>
</tbody>
</table>

OTHER IMPORTANT INSTRUCTOR POLICIES

Late Assignments
All assignments should be turned in on time. All assignments are due by the day and time noted on the course calendar. Assignments will be submitted electronically. Late assignments will be marked down. A 10% late penalty per day from the total percentage will be levied for assignments turned in past the due date and time up to a maximum of 50%.

For example, if an assignment is due on November 3 at 9:00 AM (CST):
  - If you submit the assignment prior to November 3 at 9:01 AM, you may earn full credit.
• If you submit the assignment between November 3 at 9:01 AM and November 4 at 9:00 AM, the assignment will be graded out of 90%.
• So on and so forth...
• If you submit the assignment after November 7 at 9:01 AM the assignment will be graded out of 50%.

If there are extenuating circumstances that require you to submit an assignment after its due date, please discuss this with the instructor prior to the deadline.

**Resubmitting Assignments**

You may not resubmit work that has already been used in fulfillment of the requirement of this or any other course. Rules of academic conduct require that you not use the work of others without clearly indicating it as such. Academic misconduct may result in a lowered grade, no credit for a given assignment, or removal from the course.

Per “A NOTE ON REQUESTING SPECIAL CONSIDERATION” academic policy (see below), you will not be allowed to resubmit work for a higher grade. According to this policy, if I allow one student in the class to redo an assignment, I am required to allow all students to redo the assignment.

**Extra Credit**

No extra credit assignments will be offered in this course.

**Grading and Returning Assignments**

I do my best to grade and return assignments within two weeks of the due date, but I have been known to take longer. If there is a delay beyond two weeks, I will let you know.

### COURSE SCHEDULE

<table>
<thead>
<tr>
<th>Week (Start Date)</th>
<th>Unit</th>
<th>Readings</th>
<th>Due Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week</td>
<td>Date</td>
<td>Topic</td>
<td>Readings</td>
</tr>
<tr>
<td>------</td>
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<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>5</td>
<td>10/4</td>
<td>Users &amp; Use</td>
<td>Chassanoff (2013)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Gueguen (2010)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yakel &amp; Bost (1994)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yakel (2002)</td>
</tr>
<tr>
<td>6</td>
<td>10/11</td>
<td>Metadata</td>
<td>Gracy &amp; Lambert (2014)</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>DeRose (1998)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Guenther (2003)</td>
</tr>
<tr>
<td>7</td>
<td>10/18</td>
<td>Encoded Archival Description (EAD)</td>
<td>EAD Manual</td>
</tr>
<tr>
<td>8</td>
<td>10/25</td>
<td>ArchivesSpace Overview</td>
<td>Hudja et al. (2016)</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>Leigh (2006)</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>Niu (2016)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Schlak (2008)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Zhang (2013)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Maier (2011)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cox (2010)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Benoit (2018)</td>
</tr>
<tr>
<td>11</td>
<td>11/15</td>
<td>No Lecture or Discussion: Work on Final Projects</td>
<td>Finding Aid (Word version)</td>
</tr>
<tr>
<td>12</td>
<td>11/19</td>
<td>Thanksgiving Break</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Hodson (2006)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>SAA, “Code of Ethics”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ICA, “Code of Ethics”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ACA, “Code of Ethics”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ACLR (2009)</td>
</tr>
<tr>
<td>14</td>
<td>12/3</td>
<td>XML Editors &amp; Validating EAD &amp; Excel to EAD</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>12/10</td>
<td>Emerging Issues &amp; Course Wrap-Up</td>
<td>Yeo (2013)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Chandler (2017)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Duff &amp; Harries (2002)</td>
</tr>
</tbody>
</table>

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READINGS


Douglas, Jennifer. “What We Talk About When We Talk About Original Order in Writers’ Archives.” Archivaria 76 (Fall 2013): 7-25. W2


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ASSIGNMENT PROMPTS & RUBRICS

Attendance & Participation

Class participation is an essential component of this course; therefore, it is an important part of your grade. This document outlines the expectations that are expected of you when taking this course.

Expectations

This is a very interactive class and you are expected to comment on each other’s ideas. I do not expect everyone to agree with each other. In fact, I discourage consensus. However, I do not want disagreements to turn into uncomfortable and heated exchanges. You are required to keep the conversation civil, and you are to be respectful of all class members at all times.

You are encouraged to offer constructive criticism of each other’s posts. Simply saying “this looks great!” or “I agree!” offers no outlet for ongoing discourse. You can agree with an idea but expand on it with additional evidence from the readings or professional experiences.

In your posts, you are strongly encouraged to reference the readings and other sources not listed on the syllabus. Anecdotal comments are always welcome but try to blend these with the theories and concepts covered in the readings.

Participation Assessment

For most weeks, I expect you to make at least two (2) posts (a main post and a reply post) to the designated discussion area in D2L each week.

I reserve the right to change this requirement on a weekly basis given the amount and quality of discussion in prior weeks. I will announce the number of posts required for each week in the D2L news feed and at the end of the video lecture.

Main Post

A good main discussion post indicates that you understand the concepts, issues, and applications presented that week. Think of this as a mini-essay response to the readings and lecture. For graduate students, your main post should be approximately 400-700 words. A good post will address the discussion prompt/lecture, draw on relevant literature, and incorporate personal reflection and/or readings synthesis. For undergraduate students, your main post should be approximately 250-500 words.

I am more interested in quality over quantity. Simply summarizing the readings and reaching the word limit will not equate to receiving full credit for the week. I would rather see you provide a relevant, in-depth critique of one the readings than summarize all of them (I know what they say, I have already read them).

See Table 1 for the grading rubric for your main posts.
Table 1: Participation Post Grading Rubric – Main Post

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Excellent Posts (2 points)</th>
<th>Weak Posts (1 point)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synthesis of Ideas</td>
<td>• Refers to assigned readings.</td>
<td>• No reference to assigned readings.</td>
</tr>
<tr>
<td></td>
<td>• Refers to readings from previous weeks (if relevant).</td>
<td>• Only anecdotal.</td>
</tr>
<tr>
<td></td>
<td>• Demonstrated comprehensive understanding by expanding upon ideas and concepts explored in the readings and in the lecture.</td>
<td>• Does not expand on the topic beyond the questions asked.</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>• Forms generalized ideas from the readings and questions, connects ideas, judges the merit of ideas, challenges the theories presented.</td>
<td>• Summarizes the readings with little or no attempt to critique or question the theories presented.</td>
</tr>
<tr>
<td></td>
<td>• Involves other students by asking them to clarify or explain opinions or points of view expressed in their posts.</td>
<td>• May refer to other students’ comments/posts but does little to advance the conversation.</td>
</tr>
<tr>
<td>Mechanical</td>
<td>• Sentence structure and vocabulary are lively and interesting.</td>
<td>• Sentence structure is awkward and wordy.</td>
</tr>
<tr>
<td></td>
<td>• Grammatical, spelling, or punctuation errors are very minimal.</td>
<td>• Grammatical, spelling, and punctuation errors are frequent.</td>
</tr>
<tr>
<td></td>
<td>• Satisfies the word count requirement</td>
<td>• Does not meet the minimum word count requirement.</td>
</tr>
<tr>
<td>Timeliness</td>
<td>• On time</td>
<td>• Late</td>
</tr>
</tbody>
</table>

Reply Post

A good reply post will dispute a point, provide additional references to readings and resources, and/or ask one or more questions. Your reply post should be approximately 150-250 words. Comments such as “Me too” or “I agree” (or a wordy post that is nothing more than 150 word expression of these statements) do not count as full responses. See Table 2 for the grading rubric for your reply posts.

Your reply posts must be to a discussion thread/topic started by one of your classmates. Failure to meet this requirement will result in receiving a 1 for your reply grade for that week.

You are strongly encouraged to respond to any questions/comments a classmate may ask/mention of your original post.

Once again, I am more interested in the quality rather than the quantity of your posts. I encourage you to reply to more than one post per week, however, simply posting short replies to multiple posts for the sake of posting, will not enhance your participation grade.
Table 2: Participation Post Grading Rubric – Reply Post

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Excellent Posts (2 points)</th>
<th>Weak Posts (1 point)</th>
</tr>
</thead>
</table>
| Advancing the Discussion| • Involves other students by asking them to clarify or explain opinions or points of view expressed in their posts.  
• References readings (if relevant).                                                                 | • Makes little if any attempt to advance the conversation.  
• When relevant, no reference to the readings provided.                                                                 |
| Mechanical              | • Sentence structure and vocabulary are lively and interesting.  
• Grammatical, spelling, or punctuation errors are very minimal.  
• Satisfies the word count requirement                                                                 | • Sentence structure is awkward and wordy.  
• Grammatical, spelling, and punctuation errors are frequent.  
• Does not meet the minimum word count requirement.                                                                 |
| Timeliness              | • On time                                                                                   | • Late                                                                                |

Participation Schedule

This class operates on a Wednesday-Tuesday schedule. During most weeks, you are required to make one substantive discussion post each week and at least one reply post to another student’s main post. The schedule for when posts are due is as follows:

1. **Thursday morning:** The start of class for the week. I will post the materials no later than 12:00 PM CST.
2. **By Sunday evening:** Substantive post is to be made to D2L no later than 11:30 PM CST.
3. **By Wednesday evening:** At least one response post is to be made to D2L no later than 11:30 PM CST.

90% Rule

You are required to read the posts made by your classmates. You are required to read at least 90% of all posts that you have access to (for most weeks, I will divide you into groups where you can only see the posts from your group). Students who read less than 25% of the posts will not receive any credit for this component. Students who read 26-89% of the posts will receive partial credit, or one point.

The 90% rule is typically graded on Thursday or Friday of each week. I will give you time to read last minute posts. Once the discussion grades are posted, students will not be able to make up for unread discussion posts.

Grading Criteria

Posting your main response to the discussion prompt and replying to another student’s post is just one component of your overall participation grade. Your participation grade hinges on several factors:

- Satisfying the main post requirements in terms of content.
• Satisfying the reply post requirements in terms of content.
• Reviewing at least 90% of the posts that you have access to on a weekly basis.

Each week’s participation will be worth a total of 6 points – two points for satisfying each of the criteria listed above. You may also receive 1 point for any criteria that you partially satisfy. You will not receive any points if I do not see any posts.

In short, each week I will ask: Did Jane Doe...
• Satisfy the posting requirements for the main post? Yes/No/Partially
• Satisfy the posting requirements for the reply post? Yes/No/Partially
• Review at least 90% of the posts? Yes/No/Partially

If the answers are Yes/Yes/Yes, you will receive an 6 for that week. If the answers are Yes/Yes/No, you will receive a 4 for that week. If the answers are Yes/Yes/Partially, you will receive a 5 for the week. So on and so forth.

For graduate students, your participation grade is 20% of your entire course grade. For undergraduates, your participation grade is 30% of your entire course grade. For most weeks, you will receive a participation score and feedback to help you track how you are doing in this area.

I will post your weekly grades in the Grades section of D2L usually no later than the Friday after the completion of the week, though circumstances may arise where I cannot provide the posts until the weekend or on Monday of the following week.

Late Posts

Even if you do not meet the deadlines for each post, you are encouraged to post to the forum for partial credit. Late posts (either the main or reply posts) will receive partial credit, i.e., one point, on the condition that they satisfy the other requirements of the posts in terms of content and length.

I will accept late posts until Saturday morning at 8:00 AM (CST) of the new week. For example, for Week 1, your main post is due by September 9 at 11:30 PM (CST) and your reply post is due by September 12 at 11:30 PM (CST). Late posts must be submitted no later than Saturday, September 15 at 8:00 AM (CST) to receive partial credit. Barring any unusual or unexpected circumstances, any posts made after this day and time will not receive any credit.

Please notify me if any unusual or unexpected circumstances arise that prevent you from posting for the week.

Extra Credit

No extra credit will be given to make up for missed weeks or low participation scores.

Absences

If you are absent more than three times, you will not receive any participation points towards your overall participation mark for this class. For this class, “Absence” means that you do not make a post in any forum/topic area during the week. If you do not make any post by the late submission deadline, you
will receive a zero (0) for the participation mark for that week, regardless if you have reviewed the 
course materials and/or read other postings for that week.

I realize that personal concerns may arise that cause students to participate at varying levels each week, 
and if you are unable to participate, I may grant an excused absence in the same way I would for illness 
or other matters in an onsite class.

If you know you will be absent for any extended length of time, please let me know as soon as possible.

See the next page for the Finding Aid Analysis
Finding Aid Analysis

For decades, archivists have argued about the accessibility and usability of archival finding aids. This assignment inserts you into this discussion. For this assignment, you will write a report that evaluates a finding aid of your choosing.

You may choose any finding aid you wish as long as it is online (in your report, I will need the URL). I recommend selecting a finding aid that has a fair amount of information about the repository, the collection (including its provenance), and a fairly robust content list. A short and limited finding aid will make your life harder for this assignment.

You may analyze one of the finding aids you identified for the final project if you choose to pursue option 2. If you currently work at an archives, you may not analyze a finding aid from this repository – I want you to branch out a bit and see what others are doing.

Your report should include the following information:

- An introduction that provides a description of the topic that the finding aid represents.
- Information about the finding aid – the collection to which the finding aid belongs, the repository that houses the collections, and the URL to the finding aid.
- An analysis of the finding aid that explores its accessibility, structure, level of description, use of standards, and/or content.
- An assessment about the ability of these finding aid to document the topic it represents.
- Relevant references to the readings about finding aids (you may agree with the readings or you may refute them based on your analysis). You should cite no more than five sources.

Here are some additional questions to consider when evaluating your finding aid. These questions are intended to help you with your analysis but are not required.

- **Accessibility**: Is the finding aid easy to find from the repository’s home page? How does a patron know that the finding aid exists? Is there a search feature that allows one to search only the finding aids? Can the finding aid be accessible via a smartphone or tablet? What changes when the finding aid is viewed on a smartphone or tablet as opposed to a laptop or desktop computer? Is the finding aid accessible via different web browsers?
- **Structure**: Does the finding aid use appropriate structural standards, such as extent, historical or biographical note, box list, etc.? What elements are missing? Can you tell if the finding aid is in EAD? Are there any accessibility implications for the structured used?
- **Level of description**: At what level is the collection described? Is this appropriate for the material? Why or why not?
- **Professional standards**: Does the finding aid appropriately apply descriptive standards? If so, which ones? Explain how you know that the finding aid conforms/does not conform to a descriptive standard such as DACS. Does the use (or lack of use) of any descriptive standards facilitate or inhibit access to the contents of the finding aid?
- **Accountability**: Does the finding aid mention how the archivist(s) arrived at the arrangement of the materials (see articles by Douglas and Millar).
- **Research**: Does the finding aid offer appropriate information about use of the materials in the collection? Are barriers to use such as restrictions? Do the finding aids reference each other (or other collections) to create intellectual links between collections?
- **Other**: What other aspects of the finding aid structure are unique or useful?

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Last updated: 13 August 2018
Formatting Guidelines

- **Length**: Approximately 2,000 words.
- **Spacing**: Double-spaced.
- **Title Page**: Required. Any format. The title page does not count toward word count.
- **Citations**: Chicago style. Citations do not count toward word count.
- **Bibliography**: Optional but in Chicago style if present. The bibliography does not count toward word count. You should not cite more than five sources.
- **Use of First Person**: Not permitted. Including the first person in your essay is an automatic 5 point deduction from your assignment grade.

Due Date, Submission Information, & Grading Rubric

See the [ASSIGNMENT PERCENTAGES & DUE DATES](#) for this information.

Your report should be submitted as a Word document via Dropbox in D2L. The instructor reserves the right to not make comments or provide feedback for submissions made as PDF files or in other formats.

Please use the following style when naming the file of your submission: Last name_Finding Aid Analysis

Per the course syllabus, a 10% late penalty per day from the total percentage will be levied for assignments turned in past the due date and time up to a maximum of 50%.

See [Table 3](#) for the grading rubric for this component of the assignment (next page).

Table 3: Finding Aid Analysis Grading Rubric

<table>
<thead>
<tr>
<th>Essay Criteria</th>
<th>Exemplary</th>
<th>Acceptable</th>
<th>Marginal</th>
<th>Unacceptable</th>
</tr>
</thead>
</table>
| **Description** | • Provides a thorough description of the topic and collection the finding aid represents.  
• Provides an in-depth analysis of the accessibility of the finding aid.  
• Provides an in-depth analysis of the structure of the finding aid.  
• Presents a critical explanation of other positive and negative features of the finding aid.  
• Critically incorporates the literature into the discussion.  
• Provides a brief description of the topic and collection the finding aid represents.  
• Provides a sufficient analysis of the accessibility of the finding aid.  
• Provides a sufficient analysis of the structure of the finding aid.  
• Presents a critical explanation of other positive and negative features of the finding aid.  
• Has citations but does little to incorporate the literature.  
• Provides a limited description of the topic and collection the finding aid represents.  
• Provides a general analysis of the accessibility of the finding aid.  
• Provides a general analysis of the structure of the finding aid.  
• Presents a critical explanation of other positive and negative features of the finding aid.  
• Has citations but does little to incorporate the literature.  
• Does not provide a description of the topic and collection the finding aid represents.  
• Does not analyze the accessibility of the finding aid.  
• Provides a vague description of the structure of the finding aid.  
• Does not discuss or review other aspects of the finding aid.  
• No citations to literature included. |
<table>
<thead>
<tr>
<th>Organization</th>
<th>Mechanical / Grammatical</th>
<th>too many sources (i.e., more than 5).</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The thesis statement is clear &amp; strong.</td>
<td>• Vocabulary is lively and interesting.</td>
<td>• There is no clearly stated thesis.</td>
</tr>
<tr>
<td>• The report is organized in a creative way.</td>
<td>• No grammatical errors.</td>
<td>• There is no clear structure or organization to the essay.</td>
</tr>
<tr>
<td>• Transitions are insightful.</td>
<td>• No spelling errors.</td>
<td>• Transitions between paragraphs are mostly absent.</td>
</tr>
<tr>
<td>• Each paragraph represents a new idea.</td>
<td>• Punctuation is used effectively.</td>
<td>• There is substantial repetition among the paragraphs/pages.</td>
</tr>
<tr>
<td>• The introduction is inviting.</td>
<td>• Language is professional and academic.</td>
<td>• Introduction is absent.</td>
</tr>
<tr>
<td>• The conclusion brings the essay full circle with new insight.</td>
<td>• All key terms and concepts are defined.</td>
<td>• Conclusion is absent.</td>
</tr>
<tr>
<td>• The thesis is appropriate but underwhelming.</td>
<td>• No use of the first person.</td>
<td>• Most key terms and concepts are not defined.</td>
</tr>
<tr>
<td>• The report is clearly organized.</td>
<td>• Use of first person occurs a couple times.</td>
<td>• Reoccurring use of first person.</td>
</tr>
<tr>
<td>• Most transitions are smooth.</td>
<td>• Most key terms and concepts are defined.</td>
<td></td>
</tr>
<tr>
<td>• A few instances of repetition.</td>
<td>• Use of first person occurs a couple times.</td>
<td></td>
</tr>
<tr>
<td>• The introduction is appropriate.</td>
<td>• Recurring spelling errors.</td>
<td></td>
</tr>
<tr>
<td>• The conclusion is appropriate but is mostly a summary of the essay.</td>
<td>• Recurring punctuation errors.</td>
<td></td>
</tr>
<tr>
<td>• The thesis is weak.</td>
<td>• Recurring ill-advised metaphors, similes, or illusions.</td>
<td></td>
</tr>
<tr>
<td>• Some sections are out of place.</td>
<td>• Some key terms and concepts lack definitions.</td>
<td></td>
</tr>
<tr>
<td>• Transitions are mechanical.</td>
<td>• Use of first person is prevalent throughout the essay.</td>
<td></td>
</tr>
<tr>
<td>• There are a number of instances of repeated ideas among paragraphs.</td>
<td>• Ill-advised metaphors, similes, or illusions are prevalent.</td>
<td></td>
</tr>
<tr>
<td>• Introduction ineffective.</td>
<td>• Key terms and concepts lack definitions.</td>
<td></td>
</tr>
<tr>
<td>• Conclusion ineffective.</td>
<td>• Use of first person is prevalent throughout the essay.</td>
<td></td>
</tr>
<tr>
<td>• There is no clearly stated thesis.</td>
<td>• Frequent unclear sentence structure.</td>
<td></td>
</tr>
<tr>
<td>• There is no clear structure or organization to the essay.</td>
<td>• Grammatical errors abound.</td>
<td></td>
</tr>
<tr>
<td>• Transitions between paragraphs are mostly absent.</td>
<td>• Frequent spelling errors.</td>
<td></td>
</tr>
<tr>
<td>• There is substantial repetition among the paragraphs/pages.</td>
<td>• Frequent punctuation errors.</td>
<td></td>
</tr>
<tr>
<td>• Introduction is absent.</td>
<td>• Ill-advised metaphors, similes, or illusions are prevalent.</td>
<td></td>
</tr>
<tr>
<td>• Conclusion is absent.</td>
<td>• Key terms and concepts lack definitions.</td>
<td></td>
</tr>
<tr>
<td>• Most key terms and concepts are not defined.</td>
<td>• Use of first person is prevalent throughout the essay.</td>
<td></td>
</tr>
<tr>
<td>• Recurring use of first person.</td>
<td>• Frequent unclear sentence structure.</td>
<td></td>
</tr>
</tbody>
</table>

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EAD Assignment

For this assignment, you will be given a sheet with a series of EAD errors and short answers. You will be required to fix the errors using an XML editor.

The assignment will be provided at the beginning of Week 7. You will have one week to complete it.

Assignment Evaluation

There will be no grading rubric for this assignment. Your grade will be based on how many errors you identify and how you correct them.

Due Date & Submission Information

See the ASSIGNMENT PERCENTAGES & DUE DATES for this information.

Your document should be submitted as a Word File via Dropbox in D2L.

Please use the following style when naming the file of your submission: Last name_EAD Assignment

Per the course syllabus, a 10% late penalty per day from the total percentage will be levied for assignments turned in past the due date and time up to a maximum of 50%.
Final Project

For the course’s final assignment, you will identify a set of materials, create a finding aid based on these materials, and use ArchivesSpace to generate a PDF and an XML version of the finding aid. You have two options for completing this project.

Option 1
You identify a group of materials within your own possession (current or past). Ideally, the materials you choose will focus on one topic or theme, such as your travel adventures or educational experiences, but you may also choose broader subjects that cover multiple topics/themes, such as the majority (or entirety) of your life, LGBTQ, or World War I.

Option 2
You identify 5-7 archival collections (3-5 if you are an undergraduate student) throughout the world based on a topic/theme of your choosing.

Regardless of which option you choose, your topic(s)/theme(s) cannot be based on a specific format, such as digital photographs or books. The materials may come from any date, time period, or date range.

Please do not combine the two options, doing so will only create confusion when you write your finding aid.

This assignment has four main components: Collection Identification, Constructing a Finding Aid, ArchivesSpace, and Personal Finding Aid Analysis.

Part I: Collection Identification

This portion of the assignment should be a short write-up (~500 words) that identifies your topic/theme and your rationale for choosing it. If you choose Option 1, your write-up must also include either a rough inventory of the type of materials that will go into your collection. You do not have to provide an inclusive itemized list of materials; but you should provide enough that clearly indicate to the instructor what content your collection will contain. If you choose Option 2, in addition to your rationale for choosing your topic, you must also provide the links to the finding aids that you intend to use with some explanation as to why you have selected them.

Submission Guidelines

This component of the assignment is due on September 27, 2018 by 8:00 AM CST.

Your statement and list of materials/links should be submitted as a Word document via Dropbox in D2L. The instructor reserves the right to not make comments or provide feedback for submissions made as PDF files or in other formats.

At the top of your statement, please indicate which option you have chosen.

Please use the following style when naming the file of your submission: Last name_Collection Identification
Grading Criteria

Your grade for this part of this assignment will be based on your compliance with the aforementioned criteria and the clarity of your explanation of materials/finding aids.

Part II: Constructing Your Finding Aid

For the second component of your final project will be required to submit a finding aid that you created based on the materials you identified either as part of your personal collection (Option 1) or from the various archival repositories you identified (Option 2). Regardless of which option you choose, your finding aid must satisfy the following criteria.

Graduate Criteria for Finding Aid

➢ Be compliant to DACS and contain all the required elements.
➢ Include at least five (5) optional elements found in DACS.
➢ Contain 5-7 unique series (any more than 7 series and you should reconsider the organization of your materials).
➢ At least two (2) series should each have a sub-series.
➢ Each series and sub-series should have at least six (6) folders.
➢ At least one (1) series or sub-series must have at least six (6) items that are described at the item level.
➢ At least two (2) folders must be identified as being restricted. The folders may be in the same series or sub-series.
➢ At least two (2) folders must be identified as containing electronic or digital items. The items maybe in the same series or sub-series.
➢ There must be one (1) clear example where the intellectual order does match the physical order.

Undergraduate Criteria for Finding Aid

➢ Contain 3-5 unique series (any more than 7 series and you should reconsider the organization of your materials).
➢ At least one (1) series should each have a sub-series.
➢ Each series and sub-series should have at least three (3) folders.
➢ Undergraduates do not need to describe any materials at the item level.
➢ At least two (2) folders must be identified as being restricted. The folders may be in the same series or sub-series.
➢ At least two (2) folders must be identified as containing electronic or digital items. The items maybe in the same series or sub-series.
➢ Be compliant to DACS and contain all the required elements.
➢ Undergraduates do not need to include optional elements from DACS in their finding aids.

A few other observations about your finding aid (applies to graduates and undergraduate students)

➢ Although it would be a complete waste of resources, the ratio of folders to each box is 3:1 or less. In other words, you can only fit a maximum of three (3) folders in every box.
➢ Assume the ration of items to folders is 2:1. In other words, you can only fit a maximum of two (2) items in each folder.
➢ With the exception of the series or sub-series that contains individual items, it does not matter how many objects are in each folder (though ideally, it would be more than 1 or 2).
➢ You cannot apply the MPLP methodology for your collection. This does not mean that you cannot abide by original order.

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➢ Your collection must contain multiple formats of materials in your collection. For example, you cannot have a book collection and divide it into three series or sub-series based on genre, author, publication year, etc. If your collection consists of large amounts of digital files, it should contain a variety of file formats (e.g., .png, .jpeg, .doc, .xls, .pdf, etc.). The finding aid should reflect these file formats in some capacity.

➢ I will not need to see any of the physical or digital materials described in your finding aid. This means that it is Scout’s honor to accurately label your folders.

Submission Guidelines

This component of the assignment is due on November 15, 2018 by 8:00 AM CST.

Your finding aid should be submitted as a Word document via Dropbox in D2L. The instructor reserves the right to not make comments or provide feedback for submissions made as PDF files or in other formats.

Please use the following style when naming the file of your submission: Last name_Final Project_Part II_Finding Aid

Grading Criteria

Your overall grade will be based on your compliance with the aforementioned criteria, clarity of your finding aid, and its adherence to DACS, LCSH, and name authority rules (where appropriate).

Part III: ArchivesSpace

The final component of this project will require you to use ArchivesSpace. You are expected to create a new collection/entry in ArchivesSpace based on your finding aid. Once you have inputted all the appropriate information, you will be required to generate the finding aid as an XML file that shows it encoded in EAD. There is one slight catch. Your final XML file must include at least five (5) unique non-required attributes that are generated from the resource in ArchivesSpace (you cannot add these after the fact).

Undergraduate students are required to create the resource in ArchivesSpace but they are not required to submit an XML file.

Submission Guidelines

This component of the assignment is due on December 13, 2018 by 8:00 AM CST.

The XML file should be submitted to Dropbox in D2L. The instructor reserves the right to not make comments or provide feedback for submissions made in any other format.

Please use the following style when naming the file of your submission: Last name_XML File

Grading Criteria

Your overall grade for these components will be based on the completeness of the entry in ArchivesSpace and proper use of the different fields. You will also receive a grade for the XML file and its compliance with the aforementioned criteria.

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Part IV: Finding Aid Comparison

Upon the completion of your ArchivesSpace, you must generate a PDF version of the finding aid. You will then write a brief analysis that compares the similarities and differences between the finding aid that you submitted for Part II and the one generated from ArchivesSpace. In addition to some of the formatting issues, you should explain which finding aid you deem to be more accessible. This write-up should be approximately 1,000 words in length.

Formatting Guidelines

- **Length:** Approximately 1,000 words.
- **Spacing:** Double-spaced.
- **Title Page:** Required. Any format. The title page does not count toward word count.
- **Citations:** Not required.
- **Bibliography:** Not required.
- **Use of First Person:** Not permitted. Including the first person in your essay is an automatic 5 point deduction from your assignment grade.

Submission Guidelines

This component of the assignment is due on December 13, 2018 by 8:00 AM CST.

You must submit the PDF version of the finding aid generated from ArchivesSpace and your essay as a Word file. Both files should be submitted to Dropbox in D2L. The instructor reserves the right to not make comments or provide feedback for essays submitted in any format other than Word.

For the PDF file, please use the following style when naming the file of your submissions: **Last name** _AS Finding Aid_

For the Word file, please use the following style when naming the file of your submission: **Last name** _Finding Aid Comparison_

Grading Criteria

Your overall grade for this component will be based on the thoroughness and clarity of your write-up.
**UWM AND SOIS ACADEMIC POLICIES**

The following links contain university policies affecting all SOIS students. Many of the links below may be accessed through a PDF-document maintained by the Secretary of the University: [http://www4.uwm.edu/secu/news_events/upload/SyllabusLinks.pdf](http://www4.uwm.edu/secu/news_events/upload/SyllabusLinks.pdf). Undergraduates may also find the Panther Planner and Undergraduate Student Handbook useful ([http://www4.uwm.edu/dos/student-handbook.cfm](http://www4.uwm.edu/dos/student-handbook.cfm)). For graduate students, there are additional guidelines from the Graduate School ([http://www.graduateschool.uwm.edu/students/current/](http://www.graduateschool.uwm.edu/students/current/)), including those found in the Graduate Student and Faculty Handbook: [http://www.graduateschool.uwm.edu/students/policies/expanded](http://www.graduateschool.uwm.edu/students/policies/expanded).

**ACCOMMODATIONS**

If you will need accommodations in order to meet any of the requirements of a course, please contact the instructor as soon as possible. Students with disabilities are responsible to communicate directly with the instructor to ensure special accommodation in a timely manner. There is comprehensive coverage of issues related to disabilities at the Student Accessibility Center ([http://www4.uwm.edu/sac/](http://www4.uwm.edu/sac/)), important components of which are expressed here: [http://www.uwm.edu/Dept/DSAD/SAC/SACltr.pdf](http://www.uwm.edu/Dept/DSAD/SAC/SACltr.pdf).

**RELIGIOUS OBSERVANCES**

Students’ sincerely held religious beliefs must be reasonably accommodated with respect to all examinations and other academic requirements, according to the following policy: [http://www4.uwm.edu/secu/docs/other/S1.5.htm](http://www4.uwm.edu/secu/docs/other/S1.5.htm). Please notify your instructor within the first three weeks of the Fall or Spring Term (first week of shorter-term or Summer courses) of any specific days or dates on which you request relief from an examination or academic requirement for religious observances.

**STUDENTS CALLED TO ACTIVE MILITARY DUTY**

UWM has several policies that accommodate students who must temporarily lay aside their educational pursuits when called to active duty in the military (see [http://www4.uwm.edu/academics/military.cfm](http://www4.uwm.edu/academics/military.cfm)), including provisions for refunds, readmission, grading, and other situations.

**INCOMPLETES**

A notation of “incomplete” may be given in lieu of a final grade to a student who has carried a subject successfully until the end of a semester but who, because of illness or other unusual and substantial cause beyond the student’s control, has been unable to take or complete the final examination or some limited amount of other term work. An incomplete is not given unless the student proves to the instructor that s/he was prevented from completing course requirements for just cause as indicated above ([http://www4.uwm.edu/secu/docs/other/S31.pdf](http://www4.uwm.edu/secu/docs/other/S31.pdf)).

**DISCRIMINATORY CONDUCT (SUCH AS SEXUAL HARASSMENT)**

UWM and SOIS are committed to building and maintaining a campus environment that recognizes the inherent worth and dignity of every person, fosters tolerance, sensitivity, understanding, and mutual respect, and encourages the members of its community to strive to reach their full potential. The UWM policy statement ([http://www4.uwm.edu/secu/docs/other/S47.pdf](http://www4.uwm.edu/secu/docs/other/S47.pdf)) summarizes and defines situations that constitute discriminatory conduct. If you have questions, please contact an appropriate SOIS administrator.

**ACADEMIC MISCONDUCT**

Cheating on exams and plagiarism are violations of the academic honor code and carry severe sanctions, ranging from a failing grade for a course or assignment to expulsion from the University. See the
following document (http://www4.uwm.edu/osl/dean/conduct.cfm) or contact the SOIS Investigating Officer (currently the Associate Dean) for more information.

COMPLAINTS
Students may direct complaints to the SOIS Dean or Associate Dean. If the complaint allegedly violates a specific university policy, it may be directed to the appropriate university office responsible for enforcing the policy (http://www4.uwm.edu/secu/docs/other/S49.7.htm).

GRADE APPEAL PROCEDURES
A student may appeal a grade on the grounds that it is based on a capricious or arbitrary decision of the course instructor. Such an appeal shall follow SOIS appeals procedures or, in the case of a graduate student, the Graduate School. These procedures are available in writing from the respective department chairperson or the Academic Dean of the College/School (http://www4.uwm.edu/secu/docs/other/S28.htm).

A NOTE ON REQUESTING SPECIAL CONSIDERATION
Per faculty document 1927 (http://www4.uwm.edu/secu/docs/faculty/ocr/1927.pdf), special consideration may not be granted to students. This means that I cannot grant an extension or allow you to redo an assignment or earn a better participation score other than through “reasonable accommodation of verified student disability, or the completion of work missed as the result of religious observance, verified illness, or justified absence due to circumstances beyond the student’s control.”