Contact Information
Instructor: Sarah T. Roberts
Preferred email: robert50@illinois.edu
Office hours: Fridays directly after class by appointment; other meeting times available by prior appointment

Disclaimer: This syllabus is subject to change and adjustment throughout the course of the semester, and should be considered a living document. Your instructor will announce in class any changes, updates, additions or deletions to the syllabus, including policies, assignments and readings, and may also highlight those changes via email, on the course website, or through additional means.

Course Description
This is a three-credit course on digital librarianship focusing on licensed, vendor-created electronic resources. This course is designed to give students an overview of the managerial, standards, legal, and technological issues related to the management of licensed resources such as e-journals, e-books, full text databases, digital audio and video files, and e-references resources. It has a significant copyright and licensing component. The course is useful for students in all library tracks. The course has no prerequisites and no technical background is required, although we will cover some technical material from a managerial perspective.

Objectives
Upon completing this course, students will:

• Understand the publishing market structure for scholarly and popular licensed resources (vendors, relationships, history, pricing structures)
• Master the basics of copyright law and licensing practice as it is related to digital resources, e-reserves, distance education and ILL
• Have a working knowledge of licensing best practices
• Have a general knowledge of managerial issues related to licensed digital resources such as evaluation, and preservation
• Have a managerial level understanding of technical tools important to licensed digital resources (digital object identifiers, permanent URLs, link resolvers, ERM)

About the Instructor
My name is Sarah Roberts and I will be working with you this semester as your instructor and course guide. Currently, I am a doctoral student at GSLIS and a fellow in the Information and Society research concentration. I am also a graduate of the UW-Madison SLIS, and I hold a Bachelor’s degree (in French, Spanish and Women’s Studies) from the University of Wisconsin-Madison, as well. Prior to returning to school for my Master’s degree, I spent a lengthy career in the IT sector. I am always happy to talk with students about graduate school, obtaining a Master’s or Ph.D. in LIS, career options, and related topics. I look forward to getting to know you!
http://www.lis.illinois.edu/people/students/sarah-roberts-phd-student

Our Class: A Collaborative Effort
Although my title is “instructor,” my pedagogical philosophy is deeply rooted in approaching the classroom environment as a collaborative space. It is therefore my intention to serve as a facilitator of your own informed discussions of the readings and other material with which we will engage rather than as a more formal lecturer – a “guide on the side” as opposed to a “sage on the stage” – although from time to time I will take on a larger
discussion role in order to get the most important points out on the floor. Yet we must count on each other to bring our own comments and reading experience to the class each week, as we will only get out of this experience what we put into it, collectively. To that end, we will utilize all-student discussions as well as smaller group discussions to go over the readings each week. Please come prepared to contribute each week and make yourself heard – we can’t do this without you!

**Invited Experts**

Throughout the semester a series of invited experts – practitioners, scholars and students – will be bringing their experience, expertise and insight to our course. This will afford us several great opportunities, as those joining us are subject/area experts who “know their stuff” and can speak to particulars and in greater detail. Additionally, this will give 755 students a chance to interact with and ask questions of people who are on campus or in the field; consider this both an excellent learning, as well as networking, opportunity. You will get to hear about a number of academic areas of inquiry, information policy issues, as well as be exposed to a number of different workplaces across campus engaged in ERM-related issues.

As such, PLEASE:
- Come prepared with assigned material already read;
- Be engaged; ask questions and interact with the speaker;
- Take advantage of the opportunity to learn more and expand your own professional and academic horizons!

**Course Policies**

**Grading scale:** 94-100 A; 90-93 AB; 84-89 B; below 84 C.

**Academic Misconduct:** Please see [http://students.wisc.edu/saja/misconduct/UWS14.html](http://students.wisc.edu/saja/misconduct/UWS14.html) for the University policy on academic misconduct including plagiarism. The information contained on the referenced site is in effect for this class.

**Students with Disabilities/Accommodation Needs:** It is my intention to fully include persons with disabilities in this course. Students seeking accommodations should tell the instructor within the first three weeks of class. To request accommodation, see the McBurney Resource Center ([www.mcburney.wisc.edu](http://www.mcburney.wisc.edu))

**Deadlines and Late Submission Policy:** Deadlines for assignments are 11:59 PM on the dates specified in the “Grade” section. All writing assignments for this course must be submitted in .doc or .rtf format through the drop boxes set up in the course website at Learn@UW. The drop boxes open up one week before the assignment deadline.

For late submission without notice, I grade assignments down by ten (10) percent (%) for every 24-hour period they are late.

**Extenuating Circumstances:** Fires, floods, natural disasters, illness in the family or in yourself are obviously extenuating circumstances and will be dealt with on a case-by-case basis. All I ask is that you let me know as soon as possible if such a situation arises. I will likewise extend the class this courtesy, and let you know of any changes to class meeting schedules or other issues affecting you as soon as they occur.

**Required Texts**

Recommended Texts


All texts are on “closed reserve” at the SLIS Library Circulation Desk.

Lists/Websites/Resources

Against the Grain: [http://www.against-the-grain.com/](http://www.against-the-grain.com/)
Liblicense: [http://www.library.yale.edu/~license/index.shtml](http://www.library.yale.edu/~license/index.shtml)
ER&L: [http://www.electroniclibrarian.org/erlwiki/ER%26L](http://www.electroniclibrarian.org/erlwiki/ER%26L)

Your Grade and Where It Comes From

You must complete assignments worth up to 100 points.

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Max Points</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Choose your three assignment options and email Sarah</strong> to confirm. Assignment options are listed below.</td>
<td>N/A</td>
<td>NO LATER THAN Sept 16</td>
</tr>
<tr>
<td><strong>License and or Terms of Use Critique:</strong> compare a license/terms of use statement of an e-resources vendor to guidelines outlined by Harris and language from model licenses (Liblicense/SERU, ICOLC).</td>
<td>15 points</td>
<td>By Oct 21</td>
</tr>
<tr>
<td><strong>Short essay Quiz 1</strong> (in class Nov 4: open book/note).</td>
<td>10 points</td>
<td>Nov 4</td>
</tr>
<tr>
<td><strong>Short essay Quiz 2</strong> (in class Dec 9: open book/note).</td>
<td>10 points</td>
<td>Dec 9</td>
</tr>
<tr>
<td><strong>Attendance and participation</strong> – due to the highly collaborative nature of this class, <strong>attendance AND active participation</strong> is an important class expectation – in person and online. Students should email instructor for planned absences, and notify of sickness or emergency when possible. One class can be missed without any impact on your grade. Students must seek to “make up” lost or missed work to keep all points.</td>
<td>20 points</td>
<td>Ongoing</td>
</tr>
<tr>
<td><strong>You’re the Instructor:</strong> Develop learning module for classmates. Work in a team to present/showcase an electronic resource, product or management service and do a hands-on demo in the lab. This has been a popular choice in years past! See Sarah for ideas on what to present/demo.</td>
<td>15 points</td>
<td>Variable – SIGN UP EARLY</td>
</tr>
<tr>
<td><strong>ERM Readings Reflection Blog:</strong> at least one entry per week, the last one being an assessment of this reflective experience: What was your most important earlier entry and why it has been important for your personal development? How has your thinking and knowledge about ERM changed over the semester? <strong>You must create a blog and send Sarah the URL ASAP to receive credit for blogging.</strong> Work alone on this assignment.</td>
<td>15 points</td>
<td>Weekly/Dec 16</td>
</tr>
<tr>
<td><strong>Breaking New Ground:</strong> 15-minute class presentation* on a topic we do not cover that you want to learn more about, in which you share your new knowledge with the class! See Sarah for topic approval. *“Presentation” can connote a number of things, so think creatively! Pre-recorded/edited interviews, interactive skits, a puppet show…Some things work better than others, so talk to Sarah first. Work in a team or alone.</td>
<td>15 points</td>
<td>Variable – SIGN UP EARLY</td>
</tr>
<tr>
<td><strong>Tracing Historical Trends:</strong> Publisher/vendor historical study – 8-10 pages,</td>
<td>15</td>
<td>Dec 16 –</td>
</tr>
</tbody>
</table>
1.5 spacing, not including bib. Investigate the last 20-25 years of a particular publisher of your choice. Include related publishers, associated important historical events and context. **Seek approval early. Work alone on this assignment.**

<table>
<thead>
<tr>
<th>Read and Report: Select an appropriate related scholarly book (such as James Boyle’s <em>The Public Domain</em>) and write an 8-10 page analysis/review demonstrating critical engagement with the material. Refer to examples of scholarly book reviews for inspiration. Sarah can suggest appropriate books to you, or you can seek approval for one of your choosing. <strong>Seek approval early. Work alone on this assignment.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GET TOPIC APPROVED EARLY</strong></td>
</tr>
<tr>
<td><strong>GET BOOK APPROVED EARLY</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expanding Horizons: Craft an 8-10-page paper investigating an ERM-related topic that you want to learn more about or explore more fully than class allows. <strong>Get topic approved by Sarah.</strong> 8-10 pages, 1.5 spacing, not including bib. <strong>Work alone on this assignment.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GET TOPIC APPROVED EARLY</strong></td>
</tr>
</tbody>
</table>

**Paper/Other Assignment Grading Criteria and Requirements**

- A “B” paper meets all criteria and shows adequate organization and writing. It is evidence of an adequate knowledge of the subject matter. A good description of an ongoing issue or problem would fall into this category.

- An “AB” paper meets all criteria and exhibits very strong organization and writing. An A/B paper attempts to move beyond mere description to include more advanced analysis such as comparative critique, exploration of stakeholder assumptions, meta analysis across previous work, or primary research. In doing show exhibits the writer’s strong knowledge of the subject matter.

- An “A” paper meets all the previous criteria and presents subject matter in an especially new or compelling way. It would likely link the issue at hand to larger theoretical or moral conversations outside the field of LIS. An A paper surprises and/or delights.

- Writing requirements:
  - Use a concise, clear writing style; avoid “Academese” as well as casual or colloquial writing.
  - Avoid rhetorical questions.
  - Use of bulleted lists and comparison tables is encouraged.
  - Choose and properly use a standard/appropriate citation style. For this course, APA or Chicago are best.

**Class Schedule**

**Unit 1: Introduction to the course (Sept 2)**

Overview of the course and student/instructor introductions. Review course syllabus, including policies, assignments, grading scale, schedule and class website on Learn@UW. Enjoy the Labor Day weekend!
Unit 2: Copyright Basics, History and Tendencies: The Emergence of Mashup/Remix Culture (Sept 9)

In Class: View “Rip! A Remix Manifesto”
1. Litman (2001) Digital Copyright Chapters 1-6
2. Russell Complete Copyright, Chapter 2 “Professor Kahn Exercises Fair Use” In Complete Copyright: An Everyday Guide for Librarians.

Unit 3: Copyright and Licensing History – The Legal Perspective (Sept 16)

ASSIGNMENT DUE: Choose your three assignment options and email Sarah.
1. Litman Digital Copyright Chapters 7-13.

Russell Complete Copyright:
3. American Geophysical Union v Texaco Inc 802 F Supp 1 (SDNY 1992) pp. 213
6. CONFU (The Conference on Fair Use) 1997 – just read the basic overview (http://copyright.lib.utexas.edu/confu.html) - also see Russell pp. 202-211 for full text.
7. ProCD vs. Zeidenberg, 86 F.3d 1447 (7th Cir. 1996) http://cyber.law.harvard.edu/metaschool/fisher/contract/cases/procd.htm (Hint: You may wish to check out the Wikipedia entry on this case for more context or background!)
8. Harris Licensing Digital Content Chapters 1-2

Recommended
Okerson, Ann (2000). Are We There Yet? Online Resources 10 Years After. Library Trends, 48(4), 71-93

Unit 4: Contemporary Licensing Best Practices (Sept 23)

1. Harris Licensing Digital Content Chapters 3-8
2. Russell Complete Copyright Chapter 7 “Walter Clicks ‘Yes’…”
3. ALA UCITA 101: http://www.ala.org/ala/issuesadvocacy/copyright/ucita/ALA_print_layout_1_222038_222038.cfm
LIS 755 – Electronic Resources Management – Fall 2011 – Roberts

Recommended:
- Todd A. Carpenter “ONIX for Publications Licenses” The Serials Librarian Vol. 58 No 1, pp 79-86 (machine actionable language ONIX-PL)
- Liblicense website: (http://www.library.yale.edu/~llicense/index.shtml) in particular note CLIR/DLF model license

Unit 5: Fair Use: E-Reserves and the Georgia Case (Sept 30)

Invited Expert: Carrie Kruse, Director, College Library, and expert in Fair Use and teaching.

1. Russell Complete Copyright:
   Chapter 4, pp.77-84 “Reserves and Electronic Reserves.”
5. *American Association of University Publishers complaint against Georgia State University

Recommended:

Unit 6: Pricing Models and Consortial Arrangements (Oct 7)


---

**Unit 7: Technological Protection Measures (Oct 14)**

**Invited Expert:** Professor Kristin E. Eschenfelder, GSLIS, will discuss pricing and TPM-related issues.


---

**Recommended:**


---

**Unit 8: Distance Education & TEACH Act (Oct 21)**

**ASSIGNMENT DUE:** License and or Terms of Use Critique

**Invited Expert:** Ryan P. Adserias, Doctoral Student, Department of Educational Leadership and Policy Analysis (ELPA), School of Education.


---

**Recommended:**

4. Peruse webpages for major ERMS vendors:
   - VERDE: http://www.exlibrisgroup.com/category/VerdeOverview
   - 360: http://www.serialsolutions.net/ss_360_resource_manager.html
   - ERMes: http://ermesblog.wordpress.com/

Unit 10: Data Standards & Silos (Nov 4)

ASSIGNMENT DUE: Short essay Quiz 1 (open book/notes).


   - COUNTER www.projectcounter.org
   - SUSHI http://www.niso.org/workrooms/sushi
   - CORE http://www.niso.org/workrooms/core

Unit 11: Finding Content: Discovery Tools (Nov 11)

Invited Expert: Nancy McClements. Head of Reference, Memorial Library, on selection and marketing of e-resources.


Unit 12: Perpetual Access (Nov 18)

Invited Expert: Mei Zhang, Doctoral student, SLIS, on perpetual access.


Unit 13: E-Books: Audio and Text (Dec 2)


Recommended:

Unit 14: (Dec 9) Reflections on the Worklife of an ER librarian and WRAP-UP of SEMESTER

ASSIGNMENT DUE: Short essay Quiz 2 (open book/note).