Reading Course on Marcia J. Bates

by Dr. Jenna Hartel
with special guest, Dr. Marcia J. Bates
Faculty of Information, University of Toronto
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OVERVIEW

This Reading Course[1] takes intellectually ambitious students deep into the oeuvre of Marcia J. Bates. It entails systematic study of her major writings, plus selected articles that illuminate their immediate context. Participants in the course will gain a coherent perspective on the information domain, forming the basis for an actionable understanding of the relationship between people, information, information systems, and society. Both technical and social dimensions of information will be considered holistically, making this Reading Course ideal for devotees of any iSchool concentration.

Drawing from the recently published, three-volume collection of her writings, Bates' vision will be approached in six topical sessions: 1) Biography and Social Context, 2.) Searching Behaviour, 3.) Information Seeking and Interaction, 4.) Information, 5.) The Information Professions, and 6.) Conclusion. Throughout the semester, analytical attention will be directed twofold; towards mastery of Bates' foundational ideas, and their reinterpretation and application in a contemporary information environment. In addition to independent reading, the learning process will be enriched by six, two-hour meetings of a student-lead discussion group. As a rare opportunity for iSchool students to engage a canonical individual in Library and Information Science, Dr. Bates will participate virtually in each discussion session.

To fortify newly gained insights, all readers will generate a substantial Final Paper that re-visions a seminal concept by Bates in today's Information Age. These outputs will be presented (pending acceptance) at a panel event of the June, 2017 meeting of the Canadian Association of Information Science in Toronto--which will include a live rebuttal by Dr. Bates.

The initial Winter 2017 offering of this course will serve as a pilot test for a Summer 2017 version that brings readers from around the world into reflection and debate about Bates' sweeping vision and its relevance today. The Reading Course is coordinated by Dr. Jenna Hartel, a student of Dr. Bates at the Department of Information Studies at the University of California, Los Angeles from 2001-2008, and now here collaborator, critic, and champion.

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[1] From the Faculty of Information's Academic Regulations: Reading courses meet the needs of individual students who wish to explore topics not covered by courses currently offered at the iSchool. They are categorized as elective courses, and are subject to the same regulations as other elective courses. Reading Courses require that student and instructor meet regularly and frequently; therefore, both must be available for meetings on campus. The written work of a Reading Course is comparable to that of other elective courses.

The issues covered in the course will allow students to become "conversant with fundamental concepts, theories, practices, and the diverse horizons of information disciplines", so that they "can respond to changing information practices and needs of society" (SLO 1); the course will allow them to develop social responsibility as information professionals through the development of "knowledge and values appropriate to their future exercise of economic, cultural, and/or social leadership" (SLO 2). Assignments will allow "students [to] develop the ability to contribute through research and publication, to the continuous expansion and critical assessment of the body of knowledge underlying the information"(SLO 3); "develop an understanding of the development of theory concerning information, where it is found, and how it is used" (SLO 4), and provide students the ability to "continue in life-long intellectual growth beyond graduation" (SLO 5).

BACKGROUND ON MARCIA J. BATES

Marcia J. Bates is an acclaimed theorist, educator, and writer of Library and Information Science. Her principal achievement can be located at the crossroads of information retrieval systems and user behavior. Bates' early work shed light on the vocabulary problem, interface design, search strategies, and the information seeking habits of different groups. Later contributions have focused on the nature of information and the information professions.

Dr. Bates is a canonical author per White and McCain's author co-citation analysis of the field. She is one of only three scholars to have received the *JASIS&T* Best Paper Award twice, and she has three articles among the twenty most highly cited library and information science papers of all time. Bates has won the ASIS&T Research Award (1998) and Award of Merit (2005) and the ALISE Award for Professional Contribution to Library and Information Science (2005). In 2005, she was the first inductee to the Academy of Fellows of ASIS&T's Special Interest Group on Information Needs, Seeking, and Use (SIG-USE). After retiring from teaching in 2008, she published philosophical statements about the nature of information and as a magnum opus, she edited the 3rd edition of the Encyclopedia of Library and Information Sciences (2010). In a nomination statement for the Award of Merit, peers testify that her work stands out as "creative" and "innovative" with great "originality" and "imagination."

Photos from left to right: Dr. Bates, while a student of LIS at the University of California-Berkeley (1968); Dr. Bates and doctoral student Jenna Hartel at the University of California, Los Angeles (2003); Dr. Bates (2016).

2016 marks the publication of a three-volume collection of the selected works of Marcia J. Bates: *Volume I, Information and the Information Professions*; *Volume II, Information Searching Theory and*

Practice, and *Volume III, Information Users and Information System Design*. The Reading Course draws primarily from these books , available from <u>Bates' author page at Amazon.com</u>.

Three shortcomings to Bates' enterprise have been registered (Hartel, 2010) and participants in the Reading Course are encouraged to explore other constructively critical positions. Firstly, some of her early ideas may be obsolete due to dramatic changes in the information environment. Secondly, in ways her later writings are out-of-synch with contemporary theorizing, especially those sensitized by the concept of metatheory. Thirdly, compared to scholars of equal stature (e. g. Carol Kuhlthau, Brenda Dervin) whose work has been propagated through a turnkey methodology, Bates' ideas are highly cited but not expanded by others--and therefore may have fallen short of greater impact.

PREREQUISITES & REQUIREMENTS
This is an advanced graduate seminar and suits students who have already been exposed to the work of Marcia J. Bates, ideally through coursework with Dr. Hartel. It requires the ability to analyze and critique academic literature; the social skills to discuss ideas in a small group environment; and the discipline to pace oneself through a substantial independent project.

EVALUATION
Six elements make up the evaluation rubric for the Reading Course, as summarized in the table, below.

Reading	20%	Several hours of careful independent reading per week of materials assigned in the Schedule and Reading List, below. Your performance as a reader will be evaluated by your ability to bring insightful comments and questions to the Discussion Group sessions.
Journal	10%	Create a journal with a summary and reflections on each reading; the journal will be submitted at the end of the semester and evaluated Pass/Fail.
Discussion Leader	10%	Lead the discussion for one Session. The purpose of a discussion is to expand the group's understanding of the material. How you do that is up to you. You may begin with a synthesis of key points, and then pose questions; or you may share your own critical assessment of the material; or you may link the reading to other themes or ideas in the course. Letter grading.
Participation	20%	Attend all six Discussion Group sessions; evaluated Pass/Fail.
Final Paper	30%	A substantial and original Final Paper (5,000 words) to be centered on a singular idea from Bates' oeuvre, and have two linked parts. Part 1 will thoroughly explain Bates' idea; locate it within the literature and conversation of its time; and then constructively critique its strengths and weaknesses. Part 2 will then identify a contemporary information phenomenon and analyze it through Bates' original idea; this section may include a creative extension of Bates' notion. An example appears in Chapter VII of the MI thesis by Ms. Hailey Siracky, *Spiritual Journal Keeping: An Ethnographic Study of Content, Materials, Practice, and Structure*, in which Ms. Siracky uses Bates' definitional statement, "What is a Reference Book?" as a lens to examine spiritual journals kept by religious youth. Letter grading. The Final Paper is due at the last meeting of the Discussion Group.
Presentation of Final Paper	10%	During the last meeting of the Discussion Group, present an informal overview of your paper (without PowerPoint). The presentation will be graded Pass/Fail.

Members of the Reading Course will work together to submit a proposal for a panel at the Canadian Association of Information Science conference, in Toronto, May 31-June 2, 2017 (submission deadline is January 27, 2017). The panel will feature students' Final Papers and include a rebuttal by Dr. Bates.

DISCUSSION GROUP SCHEDULE AND READING LIST

Topic 1: Biography and Social Context
Meeting Time/Date: Monday, January 30, 3:00-5:00

- Information science at the University of California at Berkeley in the 1960's: A memoir of student days.
- Marcia Bates Oral History Interview, (Text in final preferred order, with redactions), interviewed by Michael Buckland.
- Acceptance speech for the American Society for Information Science and Technology Award of Merit.
- White, H.D. & K.W. McCain. (1998). Visualizing a discipline: an author co-citation analysis of information science, 1972-1995. *Journal of the American Society for Information Science*, 49(4), 327-355.
- Hartel, J. (2013). Castles and inverted castles: the work of Marcia J. Bates. *Information Research, 18(*3) paper C31.

Topic 2: Searching Behavior
Meeting Time/Date: Monday, February 6, 3:00-5:00
Includes a discussion of the Final Paper.

- An introduction to metatheories, theories, and models.
- Information search tactics.
- Subject access in online catalogs: A design model.
- The design of browsing and berrypicking techniques for the online search interface.
- Speculations on browsing, directed searching, and linking in relation to the Bradford Distribution.
- What is browsing—really? A model drawing from behavioral science research.

Topic 3: Information Seeking and Interaction / Models
Meeting Time/Date: Monday, March 6, 3:00-5:00

- Toward an integrated model of information seeking and searching.
- Information behavior.
- Another information system fails—Why?
- The design of databases and other information resources for humanities scholars: The Getty Online Searching Project report no. 4.
- The Getty end-user Online Searching Project in the humanities: Report no. 6: Overview and Conclusions.
- Where should the person stop and the information search interface start.
- The cascade of interactions in the digital library interface. See model on p. 349, and read pp. 352-356.

Topic 4: Information
Meeting Time/Date: Monday, March 20, 3:00-5:00
- Information and knowledge: An evolutionary framework for information science.
- Fundamental forms of information.
- Information.
- Information: The last variable.
- Hjørland, B. (2011). The importance of theories of knowledge: Browsing as an example. *Journal of the American Society for Information Science and Technology, 62*(3), 594-603.
- Bates, M. J. (2011). Birger Hjørland's Manichean misconstruction of Marcia Bates' work. *Journal of the American Society for Information Science and Technology, 62*(10), 2038-2044.

Topic 5: The Information Professions
Meeting Time/Date: Monday, April 3, 3:00-5:00
- The invisible substrate of information science.
- The information professions: Knowledge, memory, heritage.
- *Introduction to the Encyclopedia of Library and Information Sciences*, 3rd Ed. (with M. N. Maack).
- Topical table of contents. *Encyclopedia of library and information sciences*, 3rd Ed.

Topic 6: Conclusion
Meeting Time/Date: Monday, April 10, 3:00-5:00
In a festive environment, readers will present for 15 minutes on their Final Papers and a concluding discussion will ensue.

H appy R eading!