CARLI Collection Management Committee:

FY 2022 Annual Report of Activities and Projects

Members

Daniel Blewett, Co-chair	2017-2022	College of DuPage
Chad Buckley	2017-2023	Illinois State University
Janice Derr	2021-2024	Eastern Illinois University
Keith Eiten, Co-chair	2019-2022	Wheaton College
Stephanie Fletcher	2022-2023	Dominican University
Lorene Kennard	2019-2022	University of St. Francis
Jayna Leipart Guttilla	2021-2024	Illinois Valley Community College
Niamh McGuigan	2020-2021	Loyola University Chicago
Scott Thomson	2019-2022	Rush University
Kris Veldheer	2021-2024	Catholic Theological Union

CARLI Board Liaison: Taran Ley, Southern Illinois University School of Medicine

E-Resources Management Task Force Liaison: Andrea Imre, Southern Illinois University Carbondale

Discovery Primo VE Task Force Liaison: Amy Killebrew, Columbia College Chicago

CARLI Staff Liaisons: Elizabeth Clarage, Jennifer Masciadrelli

Meetings

The committee met regularly, generally once each month. All meetings were held by remote teleconferencing or conference calls. The work of the committee this year was conducted by subcommittees. Subcommittees also met regularly and reported their activities back to the full committee.

Subcommittees

The Alma Analytics and Open Access eBooks subcommittees continued projects from the previous two years. One of the committee co-chairs (Keith Eiten, Wheaton College) performed a final review of the "Weeding Ebooks - Recommendations" document that last year's committee approved and shared with the membership. At our first organizational meeting in August 2021, the committee discussed and voted on topics to work on for the year. We chose to organize a subcommittee to study issues of Diversity, Equity and Inclusion (DEI) as they relate to library collection development and management. We also chose to re-activate the Open Access Ebooks subcommittee, which was largely quiet last year, to evaluate additional open

access resources that had been added to the I-Share catalog by the discharged CARLI SFX Committee in previous years.

Alma Analytics Subcommittee

The Alma Analytics Subcommittee updated the *Alma Analytics Training and Resources for Collection Development* web page, originally developed by the FY20 committee. The page gathers resources helpful to those wanting to use Analytics to better inform collection development decisions. Offering help for both new and experienced Analytics users, the page provides tips, screenshots, step-by-step instructions, and links to more advanced resources. The committee also discussed potential projects for next year, including a proposed series of online discussions for CARLI members to share their Analytics knowledge. The Discovery Primo Task Force and E-Resources Management Task Force are interested in a similar project, so there may be an opportunity to work together.

Open Access Subcommittee

The Open Access Ebooks Subcommittee evaluated about 70 open access resource collections that the CARLI SFX Committee (now discharged) had approved in previous years. The evaluation criteria of the SFX Committee were somewhat different from the ones that the CMC had used to evaluate open access ebooks. The CARLI staff recommended that the collections be re-evaluated. Prior to the migration to Alma / Primo VE, these resources would have only been available to members that subscribed to SFX. With the transition to Alma / Primo VE, the open access collections now appear in all I-Share Members catalogs. The subcommittee analyzed all of the packages. We recommended that most of them be retained but deferred a decision on some collections. Some of the open access journal collections were approved, based on publisher reputation (Sage, Springer, Oxford University Press) or the provider (Project MUSE). The remaining collections will need further analysis to determine such aspects as peer-review status, general academic interest, and the ways that users might discover them while searching Primo VE.

Diversity, Equity, and Inclusion Subcommittee

The DEI Subcommittee discussed how DEI principles can be reflected in library collections, in terms of what is currently available, and how to select materials in the future. The subcommittee evaluated the appropriate sections of various academic collection development policies, and created a document, *Sample DEI Language Used in Collection Development Policies*, that members might use to incorporate similar language into their own collection development policies, if they so desired. That document is on the CARLI website. Future activities will involve looking at how practical collection DEI audits can be done.

Weeding Ebooks - Recommendations

Keith Eiten had served on the subcommittee that produced this report last year. The report was reviewed to improve readability and to update the bibliography. Additionally, the introduction

was broadened and the recommendation section was expanded. The draft version is attached to this report as the committee plans to discuss at its June meeting.

Additional possible future tasks

In the process of evaluating open access sources, the subcommittee had some discussions about where and how work files of the subcommittee and other CARLI committees could be preserved. CARLI staff prepared Google Sheets that the subcommittee used to record data and to write evaluations; the subcommittee thought that there is value in preserving the record of our decision-making but were uncertain the process or venue for preservation of these kinds of files. CARLI staff or the CARLI Board should have discussions in the future about the most appropriate method for short-term and long-term preservation of committee work files and documents.

Lastly, the Collection Management Committee would like to acknowledge the important role of CARLI staff members Elizabeth Clarage and Jen Masciadrelli in supporting the efforts of this Committee, and to thank them for all their dedication and many hours of hard work.

Sample DEI Language Used in Collection Development Policies

As part of the Collection Management Committee's charge to embed CARLI's commitment to Diversity, Equity and Inclusion in its work, the CMC is sharing this document to assist CARLI members who wish to review and update their Collection Development Policy to incorporate DEI language and priorities.

Libraries have traditionally identified the parameters of their collection within a collection development policy. Some institutions have updated their collection development policy to emphasize their collections are inclusive of their entire community. This has been a practice in libraries but is now being codified in collection development language. Crafting good policies include using inclusive and [plain language](#).

The following are examples only and is not an exhaustive list of policies available.

CARLI Institutions:

[Wilbur Wright College Library Collection Development Policy](#) (City College of Chicago)

> **Diversity in our collection**
>
> In order to successfully fulfill our service and stewardship mission, those who are charged with developing collections employ strategies for acquiring, describing, and managing resources that go beyond normative structures, collections types, and established canons. Our decisions are informed by new curricula developed to meet the needs of a more diverse student body, new and emerging areas of research being conducted by a broad spectrum of researchers, including graduate students and newly-hired faculty, as well as by perspectives from the diminished or entirely lost voices of historically oppressed, marginalized, and under-served populations and communities.

Illinois Institution A, Private Research - Draft Language Not Yet Finalized

> In selecting materials for our collections, our actions are informed by a belief in the essential importance of intellectual curiosity, knowledge acquisition, and the human desire to create, and we endeavor to fully support the pursuit of those ends. We affirm the value of academic freedom and the free pursuit of knowledge, consistent with the liberal arts foundations of Jesuit educational practices. We strive to build collections that support research and learning both within and across disciplinary structures, and that represent a multitude of perspectives. Informed by the University's commitment to social justice, we take special care to include voices, communities, histories, and

perspectives that have been historically diminished, marginalized and/or underrepresented in library collections. Consistent with the characteristics of Jesuit education, our collecting practices are informed by a commitment to a person-centered approach to educating. As such, we collect materials with both groups and the individual in mind, always with an eye toward offering a breadth and depth of materials that can sustain a wide variety of intellectual inquiries and pursuits.

In order to successfully fulfill our service and stewardship mission, we endeavor to be responsible participants in the information marketplace. To that end, we pursue relationships that can sustain a diversity of publishers, we support the open distribution of research and academic learning, and we prioritize engagement with organizations that promote responsible publishing practices.

Illinois Institution B, Public Institution - Digital Collection Policy - Priority Areas - Draft Language Not Yet Finalized

Historically Marginalized Groups: Collections that deepen public understanding of the histories of people of color and other communities and populations whose work, experiences, and perspectives have been insufficiently recognized or unattended. These groups include, but are not limited to, Black, Indigenous, Latinx, and other People of Color; Women; Gay, Lesbian, Bisexual, Transgender, Non-binary, and other Genderqueer people and communities; Immigrants, including undocumented immigrants; Displaced populations; Blind, Deaf, and Disabled people and communities; and Colonized, Disenfranchised, Enslaved, and Incarcerated people.

Non-CARLI Institutions

ALA's [Diverse Collections: An Interpretation of the Library Bill of Rights](#)

Collection development should reflect the philosophy inherent in Article I of the *Library Bill of Rights*: "Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation." A diverse collection should contain content by and about a wide array of people and cultures to authentically reflect a variety of ideas, information, stories, and experiences.

Library workers have an obligation to select, maintain, and support access to content on subjects by diverse authors and creators that meets—as closely as possible—the needs,

interests, and abilities of all the people the library serves. This means acquiring materials to address popular demand and direct community input, as well as addressing collection gaps and unexpressed information needs. Library workers have a professional and ethical responsibility to be proactively inclusive in collection development and in the provision of interlibrary loan where offered.

A well-balanced collection does not require a one-to-one equivalence for each viewpoint but should strive for equity in content and ideas that takes both structural inequalities and the availability of timely, accurate materials into account. A diverse collection should contain a variety of works chosen pursuant to the library's selection policy and subject to periodic review.

Collection development, as well as cataloging and classification, should be done according to professional standards and established procedures. Developing a diverse collection requires:

- selecting content in multiple formats;
- considering resources from self-published, independent, small, and local producers;
- seeking content created by and representative of marginalized and underrepresented groups;
- evaluating how diverse collection resources are cataloged, labeled, and displayed;
- including content in all of the languages used in the community that the library serves, when possible; and
- providing resources in formats that meet the needs of users with disabilities.[1]

Best practices in collection development assert that materials should not be excluded from a collection solely because the content or its creator may be considered offensive or controversial. Refusing to select resources due to potential controversy is considered censorship, as is withdrawing resources for that reason. Libraries have a responsibility to defend against challenges that limit a collection's diversity of content. Challenges commonly cite content viewed as inappropriate, offensive, or controversial, which may include but is not limited to prejudicial language and ideas, political content, economic theory, social philosophies, religious beliefs, scientific research, sexual content, and representation of diverse sexual orientations, expressions, and gender identities.

Intellectual freedom, the essence of equitable library services, provides for free access to varying expressions of ideas through which a question, cause, or movement may be explored. Library workers have a professional and ethical responsibility to be fair and

just in defending the library user's right to read, view, or listen to content protected by the First Amendment, regardless of the creator's viewpoint or personal history. Library workers must not permit their personal biases, opinions, or preferences to unduly influence collection development decisions.[2]

 [1] "Services to People with Disabilities: An Interpretation of the *Library Bill of Rights*," adopted January 28, 2009, by the ALA Council under the title "Services to Persons with Disabilities"; amended June 26, 2018.

[2]*ALA Code of Ethics*, Article VII, adopted at the 1939 Midwinter Meeting by the ALA Council; amended June 30, 1981; June 28, 1995; and January 22, 2008.

 Adopted July 14, 1982, by the ALA Council; amended January 10, 1990; July 2, 2008; July 1, 2014 *under previous name* "Diversity in Collection Development"; and June 24, 2019.

ACRL Diversity Standards: Cultural Competency for Academic Libraries (2012)

Standard 4. Development of collections, programs, and services

Librarians and library staff shall develop collections and provide programs and services that are inclusive of the needs of all persons in the community the library serves.

Explanation of the Standard

Standard 4. Development of collections, programs, and services

Librarians and library staff shall develop collections and provide programs and services that are inclusive of the needs of all persons in the community the library serves.

Interpretation

Widespread changes in the linguistic and cultural fabric of library populations, coupled with the increasing sophistication of information technology, both require and make possible new approaches to the development of library collections and the provision of inclusive community-wide services. Upholding a commitment to cultural competence requires ensuring equitable access to collections and library services that is mindful of these changes.

Librarians and library staff need to learn how to detect and prevent exclusion of diverse constituents from service opportunities and seek to create opportunities for constituents, matching their needs with culturally competent services or adapting

services to better meet the culturally unique needs of constituents. Furthermore, they need to foster policies and procedures that help ensure access to collections that reflect varying cultural beliefs.

For those responsible for the development and management of library collections and/or the provision of library programs and services, this specifically involves:

● Providing an equitable basis for purchasing materials and providing programs and services.
● Ensuring that consideration of the needs of historically oppressed, underrepresented, and underserved groups is integral to collection development and management and the provision of programs and services. Regularly assessing the adequacy of existing collections, programs, and services to ensure they are reflective of the diversity of the library's constituent populations.
● Regularly reviewing the current and emergent demographic trends for the library's constituent populations to inform collection development and management and the provision of programs and services.
● Providing increased accessibility through cataloging by allowing natural language words and advocating for changes in the LOC headings.
● Creating and advocating for the creation of programs and services that are reflective of the cultural heritage, cultural backgrounds, and social identities of the library's constituent populations.
● Including constituents as major stakeholders in decision-making and advisory entities and the planning, development, and evaluation of collections, programs, and services.

Example of an Institution that includes both ALA and ACRL language:

Bemidji State University Collection Development Policy

Diversity, equity, and inclusion statement

The A.C. Clark Library fully supports BSU's Mission and Vision for Diversity, Equity, and Inclusion and selects resources for the library that uphold these values:

Mission: To foster a safe, welcoming and inclusive campus and community culture that respects difference and ensures equitable opportunities for every person.

Vision: At BSU, we celebrate and embrace diversity, and steadfastly seek to ensure equitable and inclusive environments for every person who learns, teaches, works, and

visits our campus. People are valued for their differences, and we strive to reflect that variation. We combat injustices, demonstrate kindness and encourage every individual to seek and be true to their own identities. We clearly demonstrate our commitment to the Ojibwe and to other Indigenous peoples in this country. https://www.bemidjistate.edu/offices/diversity-equity-inclusion/diversity-and-inclusion/

We also strive to incorporate the values and guidelines for diverse collections provided by the ALA Interpretation of the Bill of Rights, and ACRL Standards for Diversity:

Diverse Collections: Collection development should reflect the philosophy inherent in Article I of the *Library Bill of Rights*: "Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation." A diverse collection should contain content by and about a wide array of people and cultures to authentically reflect a variety of ideas, information, stories, and experiences. ALA, Amended 2019

ACRL Diversity Standard 4: Development of collections, programs, and services: Librarians and library staff shall develop collections and provide programs and services that are inclusive of the needs of all persons in the community the library serves.

While these guidelines provide a good foundation, we are committed to striving further. The library faculty are currently working on projects to assess the content of the collections and actively seek resources and formats to reflect diverse and underrepresented voices, and more importantly, unheard voices. Our work on this will be ongoing, as we continue to learn and apply this knowledge to developing our collections. We are learning from other institutions who have been pioneering these efforts and will be investigating their strategies as well as planning our own.

Weeding Ebooks - Recommendations

CARLI Collection Management Committee (Updated May 2022)

INTRODUCTION

Why weed ebooks? On first thought, it seems unnecessary: ebooks never get worn, damaged, or lost, and they don't take up expensive physical space. Weeding ebooks may not be on the mental to-do lists of many librarians. Most ebooks are recent publications that have not had the time to become outdated; and ebooks often evade our attention as they sit in a virtual space, only coming forward when we search in our discovery tools or go looking for them.

But all library sources, regardless of format, may eventually become outdated or superseded. As electronic forms of library sources become prevalent in our collections, they must receive the same attention that is given to physical collections. Providing our users with outdated information simply because of inattention is a lost opportunity for learning, not to mention a violation of Ranganathan's Fourth Law "Save the time of the reader."

Several standard resources and guides for weeding and management of library collections are freely available: **MUSTIE** (**M**isleading/**U**gly/**S**uperseded/**T**rivial/**I**rrelevant/easily found **E**lsewhere) is from the CREW Weeding Manual. The **CRAAP** test (**C**urrency, **R**elevance, **A**uthority, **A**ccuracy, **P**urpose), even though it is usually discussed in the context of information literacy programs, can serve equally well as a guide to weeding.

The actual procedures for identifying and withdrawing ebooks present some challenges that are not found when weeding physical book collections. Like other electronic collections, usage data is collected directly from vendors, and these data may or may not be compliant with standard data gathering schemes, for example, COUNTER. Due to the varying, or even capricious, licensing agreements that govern access to our ebooks, it may not be possible to delete all traces of withdrawn ebooks. Instead, they may live on in our systems and catalogs, still there but suppressed from public view. If ebook titles are purchased in packages and not individually cataloged but accessed via the turning on of catalog record collections in knowledge bases,

then we may have very little control over whether an individual title can even be withdrawn or suppressed.

The greater ease of access with ebooks versus paper books can result in unintended consequences. One member of the CARLI Collection Management Committee did a study of NetLibrary titles in her library's collection; she found that her library had bought updated editions of some titles in paper format but the outdated ebooks were being used more than the updated paper books because of the greater ease of access with the ebook. This issue arises primarily with publications that are frequently updated, such as style manuals, handbooks, guides, and textbooks. This suggests that certain types of publications require extra attention if they are acquired in ebook format.

This document is not a procedural manual. It is not a step-by-step guide on how to undertake a review of materials or remove the electronic footprint from your library management systems. Rather, this document provides the elements that should be considered when reviewing ebook collections. Much of the information provided is from a review of recent literature on the topic, supplemented by experiences of the members of the CARLI Collection Management Committee.

AUDIENCE

The CARLI Collection Management Committee prepared this document with the intended audience to be librarians and staff at member institutions.

BRIEF LITERATURE REVIEW

CREW Manual (2012 version) is a useful work. Although it is written primarily with small- to medium-sized public libraries in mind, all types of libraries can benefit from a study of this publication. **CREW** (**C**ontinuous **R**eview, **E**valuation and **W**eeding) places deselection within the broader context of library practice, and it always keeps in mind the needs of an individual library's community of users. The CREW model integrates deselection into the entire acquisitions-cataloging-circulation/reference cycle, and makes weeding/deselection the last step in the cycle. It introduces the acronym **MUSTIE** (**M**isleading/**U**gly/**S**uperseded/**T**rivial/**I**rrelevant/ easily found **E**lsewhere), which is helpful to remember the factors to consider when reviewing a title for retention. Since "Ugly" is not a factor in ebooks, the acronym **MiSTIE** would perhaps be more accurate.

Crosetto (2012) and Cully (2015) are recommended as good overviews of the issues relating to weeding ebooks. For both authors, currency of information is the primary factor to consider when deciding to retain an e-publication or not.

Waugh et al. (2015) present an intriguing case study in deselecting ebook collections. They describe a project to evaluate a collection of NetLibrary titles from the early 2000s; in the process, they outline the problems of early ebook publications: outdated medical titles, the hazards of "link rot" in many aging titles, and trying to deselect some titles but not all of them in a collection. This publication will be of interest to those CARLI libraries that purchased similar titles from NetLibrary and may want to begin the process of weeding them.

WEEDING RECOMMENDATIONS

The reasons to weed e-books are really no different than for weeding paper books. We need to delete titles with irrelevant content or subject matter, with low use, with outdated content or superseded editions, with duplicate content, and those titles that simply add clutter to your collection without adding value.

- The content no longer relevant to your users

  - "Criteria for weeding e-books should be similar to those that should already be in place for print resources. While the physical condition is not an issue, the content is still applicable. Libraries should evaluate if patron needs have changed, and if some subject area use has decreased." (p. 4) - Culley

  - "E-books should be treated in the same way as physical collections, with guidelines for retention based on use, accuracy of information, and relevance to the patron" (p. 26) - Moroni

- Low usage

  - "Physical items that have low use or do not circulate occupy space. Although an unused e-book is not taking up valuable real estate space on the shelves, it does occupy space in the online catalog." (p. 86) Crosetto

  - "Circulation counts are viable, as are annualized turnover statistics, particularly if you already use those measures for your physical collections." (p. 26-7) - Moroni

- Content outdated

  - "The more important of the traditional reasons for weeding is currency of content. Outdated resources occupy valuable space on the shelf and in the catalog." (p. 86) - Crosetto

  - "...it is inadvisable to keep large amounts of outdated and inaccurate materials that could be damaging to the integrity of researchers' work." (p. 4) - Culley

- Content superseded by a new edition

  - Reference titles are a priority for weeding, whether in print or electronic form. "This is most evident with reference titles. Resources traditionally identified as reference items typically have higher costs, may contain multiple volumes, and are regularly updated, often annually. Some reference titles remained on shelves indefinitely, while others—once superseded by newer editions—were typically regulated to circulating collections, remote storage, or discarded. The same criteria used for weeding physical reference titles should be applied to reference e-books." (p. 86) - Crosetto

- Duplicate content

  - "...removing e-books from the DDA program that are duplicated in any subscriptions would save libraries from unnecessary purchases." (p. 4) Culley

  - "Including all formats in the consideration of the collection, rather than separately, can present a better picture of the completeness of the collection. You do not need to retain all titles on a topic or by an author in all formats, but should consider maintaining a complete backlist or subject coverage combined across formats" (p. 26) - Moroni

- Clutters catalog

  - "Physical items that have low use or do not circulate occupy space. Although an unused e-book is not taking up valuable real estate space on the shelves, it does occupy space in the online catalog." (p. 86) - Crosetto

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  - ■ "The more important of the traditional reasons for weeding is currency of content. Outdated resources occupy valuable space on the shelf and in the catalog." (p. 86) - Crosetto

- Who should be involved or consulted in the weeding process of ebooks is potentially more complex than with paper books. Ebook packages may require more consultation with other librarians and with teaching faculty at your institution, to make sure all parties' interests are protected. Publishers and access providers will be involved in providing proper usage statistics.

  - ○ "...the most important way for librarians to build and strengthen the lines of collaboration is to involve all interested individuals in the evaluation process and potential withdrawing of titles. K–12 teachers, academic instructors, and researchers, who are asked to submit requests for purchasing titles, should also be included in the removal of titles." (p. 87) - Crosetto

CHALLENGES

- Ebooks that were purchased as part of a package probably will require extra handling. Check to ensure that individual titles that you wish to withdraw can be suppressed in your discovery system. This may require negotiations with the vendors who are supplying access to the ebooks.
  - ○ "However, due to the access configuration of shared titles in EBSCO's e-book platform, participants cannot suppress, remove, or "turn off" e-books they share with others, even via their own vendor portals. With the CCLC [California's Community College Library Consortium] shared collection, it's an all or nothing situation, where title removals affect all license holders. One option for libraries no longer wishing to provide access to specific titles is to remove catalog records from their ILS, reducing the chance that a given title would be found. Still, the title remains "discoverable" by patrons in other ways, including through EBSCO eBook Collection portals." (Weintraub)
  - ○ Remember that even when a title is removed, it may still be licensed under your contractual agreement with the vendor/publisher. (p. 27) - Moroni

- ○ "When the first shared collection was offered, the long-term consequences of this configuration, as well as e-book search and retrieval behaviors of patrons, were not fully understood by participating libraries. (Weintraub)"
  - ○ "...equally important element of the weeding process of e-books: the purchasing model. The librarians need to know where the e-book resides, which then regulates how the e-book is weeded." (p. 87) - Crosetto

- Gathering usage statistics will require extra effort. The ILS may provide some useful statistics, but generally you will need to retrieve whatever usage statistics you can from the vendor. The statistics they provide may require interpretation to be useful. If they are not compliant with standards, you may need to survey library or faculty colleagues to get an informal sense of use patterns for an individaul title or group of titles

  - ○ Relying solely on the ILS to evaluate collection contents and usage statistics will result in incomplete information, especially if you use external/non-integrated ebook platforms. (p. 27) - Moroni

- It will probably be helpful to devise a way to record the data that inform your retention decisions. There are many options that could work, such as available note fields within your LMS or other E-resource management tools. Even something as simple as a spreadsheet to record your retention decisions would be more helpful than relying on memories of staff.

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