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2021–2022 ANNUAL REPORT OF ACTIVITIES AND PROJECT

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.

DRAFT

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/**E**asily 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

- “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 individual 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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**CARLI Commercial Products Committee
FY 2022 Annual Report of Activities and Projects**

Members

Neil Das	2021-2021	Southern Illinois University
Jessica Harris	2021-2024	University of Chicago
Michele Hunt	2021-2024	Northern Illinois University
Sarah Johnson	2021-2024	Eastern Illinois University
Edith List	2021-2022	Principia College
Marie Martino	2019-2022	Moraine Valley Community College
Megan Ruenz, Chair	2019-2022	Wheaton College
Mary Tatro	2021-2023	Augustana College
Amanda Wiesenhofer	2021-2023	Lincoln Land Community College

Board Liaison: Matt Ostercamp, North Park University

CARLI Staff Liaison: Nicole Ream-Sotomayor, Jennifer Taylor

Activity Highlights

Electronic Resource Proposals

The CPC received 4 product proposals in FY22. After review by the committee, 1 proposal for MLA Handbook was accepted.

2022 Accessibility in Libraries Forum

This year, the committee organized and hosted the *CARLI Commercial Products Committee's 2022 Accessibility in Libraries Forum*, which took place on April 6th, 2022, from 10am to 12pm. A call for proposals went out in January, encouraging CARLI members to submit proposals on any accessibility projects and practices they've successfully implemented. There were four sets of presenters from four different CARLI member institutions, who presented on various topics:

- "Testing & Communicating the Accessibility Features of Ebook Platforms at UIC," Catherine Lantz & Ryan Lemke, University of Illinois-Chicago
- "To Be Seen & Heard: Optelec Clearview+ Speech," Debra J. Kakuk Smith, College of DuPage
- "Access and Equity via Library Policy Review," Michele Hunt (she/her) & Sata Prescott (he/they), Northern Illinois University
- Accessibility in CARLI Electronic Resource Licenses," Dan Szajna & Jenny Taylor, University of Illinois System Offices

Each shared information about a recent accessibility initiative in a 20-minute slide presentation and answered questions posed by audience members. The webinar was well-attended with 80 registrants for the live event. Additionally, the webinar was recorded and a link to the recording was shared over the "E-Resources listserv" for those who could not attend the live session and is accessible via the CARLI website.

2021-2022 Instruction Committee

Annual Report of Activities

Members

Kristin Allen, 2019-2022, Harper College, Co-Chair
William Condon, 2021-2023, Prairie State College
Tish Hayes, 2019-2022, Moraine Valley Community College, Co-Chair
Joanna Kolendo, 2021-2023, Chicago State University
Heather Koopmans, 2021-2024, Illinois State University
Loren Mixon, 2021-2024, Kankakee Community College
Alex O'Keefe, 2021-2023, School of the Art Institute of Chicago
Dee Anna Phares, 2019-2022, Northern Illinois University
Firouzeh Rismiller, 2021-2024, DePaul University

CARLI Staff Liaisons

Debbie Campbell
Denise Green

Charge

The committee will identify and address issues of critical concern and best practices for instruction librarians and information literacy programs. The Instruction Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, inclusion, and equity (DEI), and will ensure that CARLI's commitment to diversity, equity, and inclusion is embedded in their work.

Meetings

Because of the COVID-19 pandemic, all meetings were held by video conference and took place on the third Wednesday of the month from 2-3:30 pm. The committee also used the instruction@carli.illinois.edu mailing list and a Google Drive folder to share information and documents outside of meeting times.

Theme

The committee's theme this year was **"Re-imagining Instruction After Disruption"**. This theme acknowledges the challenges and changes of the past couple of years, while highlighting the growth and creativity librarians have embraced in the wake of that upheaval. Many of us have sought out new technologies to better connect with our students, while others have had opportunities to restructure curriculum and instruction programs. As a committee and at our

events, we discussed how to engage with students in different environments, (synchronously, asynchronously, hybrid, face-to-face, etc.). The Instruction Committee's programming this year created space for librarians to discuss what has changed since the onset of the pandemic in 2020, present any adaptations they have made to their instruction modalities, and share new resources and tips. Each of the four Article Club events (detailed below) hosted by the Instruction Committee were discussion-based and were not recorded in an attempt to foster open and honest conversations. Our fifth and final event was the 10th annual CARLI Instruction Showcase, where the keynote theme was open pedagogy, which meshed well with the committee's theme as well as connecting to facets of the ACRL Framework, (especially that students are not only consumers of information, but creators). The Showcase also focused on how librarians used technology in their teaching this year, and shared innovative lesson plans. Attendees showed up ready to engage with each other and share their experiences.

Instruction Committee Events

Compact but Nimble: Navigating the Challenges and Discovering the Benefits of Small Libraries

When: Wednesday, October 27th from 1-2pm

Where: Virtually through Zoom

There are specific challenges that small academic and rural libraries face that are unique, which can be related to staffing, budget, library instruction, etc. This discussion created space for librarians to discuss how we navigate issues that are faced by small libraries and share strategies on how to manage them. The conversation was lively with a lot of resources shared in the chat. This conversation clearly resonated for people attending, and everyone seemed to value the opportunity to connect around these issues.

The discussion was not recorded to encourage honest and open dialogue. 56 people registered for this event.

Please see the link to view the list of questions that were used to facilitate the discussion, and the resources that were shared:

<https://www.carli.illinois.edu/compact-nimble-navigating-challenges-and-discovering-benefits-small-libraries>

Teaching Information Privilege: A Discussion

When: Tuesday, November 30th from 1-2pm

Where: Virtually through Zoom

This article discussion centered on “Information Privilege and First-Year Students: A case study from a first-year seminar course using access to information as a lens for exploring privilege”, by Charissa Powell, Student Success Librarian for Information Literacy at University of Tennessee Powell’s case study article overviews her first-year seminar, Information Privilege. It details the format of the class, the activities and curriculum, and also what students gained by the end of the class. The article offered a jumping off point for librarians to discuss the ways they integrate information privilege into their teaching and also the challenges of doing so in the typical one-shot session.

The discussion was not recorded to encourage honest and open dialogue. 56 people registered and 41 people attended the event. Please see the link to view the list of questions that were used to facilitate the discussion, and the resources that were shared:

<https://www.carli.illinois.edu/instruction-discussion-20211130>

Are you as conflicted as we are? Challenges with teaching subject headings

When: Friday, February 11th from 1-2pm

Where: Virtually through Zoom

In “Are you as conflicted as we are”, Frances Brady (Adler University) and Alissa Droog (Northern Illinois University) shared their encounters with inconsistencies in subject heading applications and asked how others are dealing with these difficulties. Librarians engaged through polls, chat, and verbal discussion. Although teaching subject headings is often necessary in specific disciplines, many librarians find them too restrictive and problematic, because of out-dated terminology. Librarians shared that keywords were a good starting point for searches, in part because students are comfortable using them, and they cast a wide net in full-text searches. Most attendees teach both depending on context and need, but there continues to be conflict and challenges in that process.

The discussion was not recorded to encourage honest and open dialogue. 70 people registered and 47 people attended the event.

Please see the link to view the list of questions that were used to facilitate the discussion, and the resources that were shared: <https://www.carli.illinois.edu/instruction-committee-20210211>

"Creating a Student-Centered Alternative to Research Guides" Discussion

When: Friday, April 1st from 1-2pm

Where: Virtually through Zoom

This article discussion centered on “Creating a Student-Centered Alternative to Research Guides: Developing the Infrastructure to Support Novice Learners”, by Jeremiah Paschke-Wood, Ellen Dubinsky and Leslie Sult. The authors explored patron interactions with LibGuides to

determine how effectively subject-specific guides support completion of coursework and student research. The article outlines the authors' redesign of FAQ pages and guides and their rationale for the changes—based on a need for clarity, simplicity, and context, as well as a focus on student-led research processes. The discussion focused on how librarians are using research guides in instruction and what has been successful. Some of the conversation highlighted the need for assessment of guides to better understand what students are taking away.

The discussion was not recorded to encourage honest and open dialogue. 90 people registered for the event.

Please see the link to view the list of questions that were used to facilitate the discussion, and the resources that were shared: <https://www.carli.illinois.edu/Instruction-Committee-20210401>

Instruction Showcase

When: Friday, May 20th from 9:30am-2:00pm

Where: Virtually through Zoom

This year, the theme of the Showcase was “Re-imagining Instruction After Disruption”. The event featured a keynote presentation by Janet Swatscheno from University of Illinois at Chicago titled “‘I’m excited but have no idea what I’m doing’: How Libraries Can Support Open Pedagogy and Why They Should” which focused on the value of OER and open pedagogy and how academic librarians can both support and participate in open educational practices. In addition to the keynote, there were two sessions that highlighted new tech that proved useful in providing instruction. There were also two lesson plan presentations that featured new approaches to instruction. The keynote and breakout presentations all demonstrated the new ways librarians are imagining instruction. The Committee also incorporated a [zine-making activity](#) (and developed a [pre-made zine highlighting the year’s events](#)) to encourage interactivity among participants and to further connect the Showcase themes and topics. Despite the complications imposed by the ongoing pandemic, librarians keep finding engaging ways to connect with students and support their learning.

This virtual event was well-attended, with 146 registrants with the number of attendees varying depending on the session. A video of the Showcase will be made available on the CARLI website at: <https://www.carli.illinois.edu/products-services/pub-serv/instruction/InstructionShowcase>

Respectfully Submitted by
Kristin Allen and Tish Hayes
Co-Chairs, 2021-2022

2021-2022 CARLI Open Educational Resources Committee Annual Report of Activities and Projects

Members

Amber Burtis	2021-2024	Southern Illinois University Carbondale
Denise Cote	2021-2022	College of DuPage
Catherine Galarza-Espino	2021-2023	Morton College
Kim Hale	2021-2022	Columbia College Chicago
Daniel Matthews, Co-chair	2020-2024	Moraine Valley Community College
Christina Norton	2021-2022	Bradley University
Tineka Scalzo	2021-2024	City Colleges of Chicago
Janet Swatscheno	2020-2022	University of Illinois Chicago
Chris Sweet, Co-chair	2020-2023	Illinois Wesleyan University
Tamara Townsend	2021-2023	City Colleges of Chicago

CARLI Board Liaisons:

Karen Janke, Erikson Institute

Jacob Jeremiah, Oakton Community College

CARLI Staff:

Anne Craig, Elizabeth Clarage, Michele Leigh, and Nicole Swanson

Meetings

The committee met monthly by conference call on the third Thursday of each month from 1:00-2:30 p.m.

Activities

Understanding and Promoting Open Educational Resources Workshops

This 3-week virtual “Train the Trainer” course was developed in 2020 by OER Committee and is based on openly licensed materials from the Open Education Network. It meets synchronously for an hour and half each week along with asynchronous readings and activities. Since all offerings of this workshop filled for FY21, 8 additional offerings were opened for FY22. Two concurrent workshops were

offered in July and December of 2021. In 2022, workshops were held in February, May, and two concurrent workshops in June. In total, 100 CARLI affiliated librarians attended the course.

This course was taught by: Anne Chernaik (College of Lake County), Elizabeth Clarage (CARLI), Denise Cote (College of DuPage), Kim Hale (Columbia College Chicago), Michele Leigh (CARLI), Dan Matthews (Moraine Valley Community College), Thane Montaner (Prairie State College), Christina Norton (Bradley University), Michelle Oh (Northeastern Illinois University), Anne Shelley (Illinois State University), Sue Shultz (DePaul University), Charlene Snelling (Chicago State University), Nicole Swanson (CARLI), Janet Swatscheno (University of Illinois Chicago), and Chris Sweet (Illinois Wesleyan University).

OER Faculty Workshop

The Committee designed and developed in 2021 an OER Faculty Workshop to be offered periodically to faculty and administrators from Illinois institutions. In FY22, Committee members updated the content. The workshop was held on July 15, 2021 and January 27, February 23, and March 30, 2022. 9 reviews were generated through member institutions offering stipends to their faculty who attended and wrote a review in the Open Textbook Library. Two faculty not associated with institutions offering an incentive wrote a review of an open textbook. Registration and attendance for both workshops demonstrated a strong interest in learning more about OER from faculty across the state as reflected in the numbers below. 113 total faculty members and librarians attended the workshops.

The workshops were taught by: Annette Alvarado (Loyola University Chicago), Amber Burtis (Southern Illinois University Carbondale), Elizabeth Clarage (CARLI), Catherine Galarza-Espino (Morton College), Michele Leigh (CARLI), Dan Matthews (Moraine Valley Community College), Christina Norton (Bradley University), Sue Shultz (DePaul University), Nicole Swanson (CARLI), Chris Sweet (Illinois Wesleyan University), and Tamara Townsend (City Colleges of Chicago).

OER Commons and the Open Illinois Hub

Throughout 2021-2022 the OER Committee continued to promote using and adding to the [Open Illinois Hub](#) on OER Commons.

22 CARLI libraries have developed intuitional presences within the Open Illinois Hub. The “Curated Collections” portion of the hub has been extensively developed over the last year, while a few “OER from Illinois” have been added.

The workshop [“OER Commons Hub Overview”](#) was offered by Elizabeth Clarage and Nicole Swanson (CARLI) on October 27th providing librarians with the basics of how to use the Open Illinois Hub. 54 librarians attended the workshop.

On December 9, 2021 multiple members of the CARLI OER Committee and some CARLI Governing Members attended an Open Author training session presented by Megan Simmons (ISKME). Open Author is an OER authoring platform that is part of OER Commons. 28 librarians attended this event.

On April 1, 2022 OER Committee members Elizabeth Clarage (CARLI), Michele Leigh (CARLI), Dan Matthews (Moraine Valley Community College), Christina Norton (Bradley University), Tineka Scalzo (City Colleges of Chicago), Nicole Swanson (CARLI), and Chris Sweet (Illinois Wesleyan University) gave a presentation on the OER Commons Hub for an IACRL Spark event [“Open Pathways-Exploring the Intersections of Diversity, Equity, and Inclusion and Open Educational Resources.”](#) The presentation was followed with group discussions about the interfaces of OER and DEI.

Committee members also had a presentation entitled “CARLI presents: the Open Illinois Hub” accepted for the ILA Annual Conference in October.

Open Education Network: Certificate in OER Librarianship Program

In 2021, the CARLI OER Committee proposed to the CARLI Program Planning Committee to offer full scholarships for up to five librarians from CARLI-member institutions to attend the Open Education Network’s Certificate in OER Librarianship. This proposal was accepted. Unfortunately, no member librarians were accepted into the program. However, two CARLI staff members were accepted and able to participate in the program. Five previous participants of the Open Education Network Certificate in OER Librarianship program joined the CARLI OER Committee in 2021.

Open Education Week

As part of Open Education Week, March 7-11, 2022, CARLI hosted a 2-part Open Pedagogy series as well as shared CARLI member institutions’ OER Success Stories on the CARLI OER email list.

[Open Pedagogy Series](#)

CARLI hosted a 2-part series *Open Pedagogy in OER* presented by Will Cross, Director of the Open Knowledge Center & Head of Information Policy at NC State University, an instructor in the UNC SILS, and an OER Research Fellow. The series was offered to

CARLI members, members of the Professional Development Alliance, and members of the Open Education Network. The workshop was comprised of two sessions. 81 CARLI member librarians attended the live webinars, and 55 CARLI members viewed the recording made available after the workshops. The descriptions for the two workshops are as follows:

Workshop 1: Introducing Open Pedagogy: From Open Resources to Equitable, Student-Centered Practices

“In this workshop Will Cross introduces open pedagogy, an access-oriented commitment to learner driven education. Just as open educational resources can remove financial barriers for students, open pedagogy empowers faculty and students to build courses that reflect and connect out to the world in which they live. This workshop introduces the core values of open pedagogy and walks you through successful models for putting open pedagogy into practice.”

Workshop 2: Implementing Open Pedagogy: Outreach and Advocacy for Developing Faculty Partnerships

“In this workshop Will Cross explores strategies for making open pedagogy work at your institution. Building on the Introducing Open Pedagogy workshop, Will Cross explores strategies for developing a team to support open pedagogy and develop a tailored action plan for connecting with faculty instructors. Because this session is focused on outreach and team building, attendees are encouraged to invite colleagues from across campus including instructional designers, learning technology experts and, of course, faculty instructors.”

OER Success Stories

The committee also shared CARLI member institutions' OER Success Stories to the CARLI OER email list. We received a total of eleven success stories from: Bradley University, City Colleges of Chicago, College of DuPage, Columbia College Chicago, Dominican University, Illinois State University, Illinois Wesleyan University, Northeastern Illinois University, Northwestern University, Southern Illinois University Carbondale, and University of Illinois Chicago.

OER Office Hours

The OER Committee continued this professional development opportunity for CARLI members in FY22 to provide a space for informal discussions about OER. Five sessions were held throughout the year. In November 2021, the committee decided to take [notes](#) from the conversations and share them with the CARLI OER email list to

make them available to members that could not attend and provide links to resources shared during the conversation. 80 librarians attended the talks over the course of the year. The topics for discussion during the past year were:

- Publisher Response to OER: Openwashing (November) Facilitated by OER Committee Members
- Engaging Faculty Through a Community of Practice (December) Facilitated by OER Committee Members
- Funding for OER (February) Facilitated by Janet Swatscheno, Notes taken by Dan Matthews
- Faculty and Student Collaborations (March) Facilitated by Dan Matthews, Notes taken by Catherine Galarza-Espino
- OER and Accessibility (April) Facilitated by Christina Norton, Notes taken by Tineka Scalzo
- Designing Faculty Incentive Programs for OER (May) Facilitated by Amber Burtis, Notes taken by Dan Matthews

CARLI U.S. Department of Education Open Textbook Pilot Grant Application: SCOERS Grant

CARLI received a 3-year award of \$1.08 million for [Illinois SCOERS](#) for the creation of open textbooks and ancillary materials that include 3D printing as a pedagogical tool funded by the Open Textbooks Pilot Grant received from the Fund for the Improvement of Post-Secondary Education (FIPSE) and the U.S. Department of Education.

CARLI OER Committee members, past and present, assisted in the subgrant application submission process, reviewing the subgrant applications, and serving on the Advisory Committee including Anne Chernaik, Dan Matthews, Michelle Oh, Sue Shultz, Janet Swatscheno, and Chris Sweet.

**CARLI Preservation Committee
FY 2022 Annual Report of Activities and Projects**

Members:

Melina Avery	2020–2023	University of Chicago
Sarah Cain	2021–2021	Northern Illinois University
Rob DeLand	2019–2022	VanderCook College of Music, Co-Chair
Theresa Embrey	2021–2024	Pritzker Military Library and Museum
Nora Gabor	2018–2022	DePaul University
Tonia Grafakos	2018–2024	Northwestern University, Co-Chair
Jade Kastel	2021–2023	Western Illinois University
Ellen Keith	2022–2023	Chicago History Museum
Becky Koch	2019–2022	Illinois State University
William Schlaack	2018–2022	University of Illinois Urbana-Champaign, Co-Chair

CARLI Board Liaisons: Pattie Piotrowski, University of Illinois Springfield

CARLI Staff Liaisons: Elizabeth Clarage and Nicole Swanson

Meetings

The Preservation Committee met 11 times during 2021-2022:

- 11 conference calls (all meetings held online due to COVID-19 restrictions) – July 23, September 20, October 18, November 8, December 13, 2021; January 10, February 13, March 21, April 11, May 9, and June 13, 2022.

Activities

- Maintained and updated the [Preservation Resources webpage](#)
- Adapted annual projects to meet the remote requirements of committee members, with the committee also acting as a conduit to share news updates regarding staff and collection decisions from member libraries.
- **Annual Project 1: “[Working with Fire Professionals](#)”** was held on January 25, 2021.
 - Description of the presentation: Chief John High, Sr., Investigation and Prevention Program Manager at the Illinois Fire Service Institute – the statutory State Fire Academy for Illinois, spoke to attendees about fire hazards, how to prevent them, and how the fire department will respond to the call.
 - Due to the pandemic, the committee planned this program in a virtual format. It was promoted to CARLI members, members of the Professional Development Alliance, Illinois libraries and other cultural heritage institutions, and the Midwestern Archivists Conference.
 - This program had 112 registrants, 53 live attendees, and 42 views of the recording.

- **Annual Project 2: Quick Tips for Disasters & Emergencies**
 - Committee members wrote a series of monthly articles for libraries, archives, and other cultural institutions to guide them as they create, fine tune, or revise their institutions' disaster plans. These blog articles were shared with members via the *CARLI News* as well as linked on the project website [Quick Tips for Disasters and Emergencies](#).
 - **November: [“Developing a Full Disaster Plan”](#)** – Jade Kastel, Music Librarian, Western Illinois University
 - Readers were introduced to a curated list of guides for institutions embarking in disaster preparedness or those revisiting their current disaster plan.
 - **December: [“Disaster Kits”](#)**– Becky Koch, Conservation and Preservation Specialist, Milner Library, Illinois State University
 - Being prepared for anything means not only having plenty of disaster response supplies, but also having them close at hand. Mini “Disaster Kits” located in multiple locations allows staff to respond to any emergency as soon as possible. The article focused on the benefits of crating mini disaster kits and a list of useful supplies.
 - **January: [“Creating a Response Poster for Water-based Disasters”](#)** – Tonia Grafakos, Marie A. Quinlan Director of Preservation, Northwestern University
 - To minimize stress and ease uncertainty during a water disaster, Northwestern University Libraries created a one-page water disaster poster to aid staff response. A copy of the poster was included in the article that can be customized to the needs of other institution.
 - **February: [“Disaster Preparedness: Emergency Contact List on Campus”](#)** – Melina Avery, Conservator, University of Chicago Library
 - When a disaster may affect collections or is already causing damage, knowing who to call is one of the first steps in an effective response. This article focuses on the importance of creating and disseminating an emergency contact list within institutions.
 - **March: [“Don’t Table This! The Importance of Tabletop Exercises for your Disaster Plan”](#)** – William Schlaack, Digital Reformatting Coordinator, University of Illinois at Urbana-Champaign
 - After creating an institutional disaster plan the next step should be to consider planning a tabletop exercise to see, in a controlled setting, just how good your plan really is. Tabletop exercises are guided sessions led by a facilitator(s) to simulate an emergency. These sessions allow staff specified in the disaster plan to discuss and better understand their role during various disasters.
 - **April: [“Identifying Priorities”](#)** – Rob DeLand, Head Librarian and Archivist, VanderCook College of Music
 - An important aspect for disaster planning is to identify the most

at-risk or valuable collections, the objects, collections, and records that are vital to your institution, and to have a plan in place to make sure those items are cared for as well as possible. Learn about creating priority lists, the content to include, and factors to consider in this article.

- **June: An Overview of the Recent Renovation Project at the Chicago History Museum** – Jade Kastel, Music Librarian, Western Illinois University
 - Julie Wroblewski, Head of Collections at the Chicago History Museum shares an in depth look at a capital renovation project for the Chicago History Museum's collection storage and how the pandemic impacted the project. This article will be shared in the June *CARLI News*.
- **June: Wrap-up of the Quick Tips for Disasters & Emergencies Series** – Melina Avery, Conservator, University of Chicago Library
 - A summary of the year-long project will be shared in the June *CARLI News*.

Respectfully submitted by

Tonia Grafakos (Northwestern University) and Rob DeLand (VanderCook College of Music)
Co-chairs, 2021–2022

2021-2022 Public Services Committee Annual Report of Activities and Projects

Name	Term	Institution
Caitlin Archer-Helke	2019-2022	Saint Xavier University
Jessica Bastian	2020-2024	Illinois Central College
Krista Bowers Sharpe	2019-2022	Western Illinois University
Chad Kahl	2018-2023	Illinois State University (co-chair)
Cynthia Kremer	2019-2022	Joliet Junior College (co-chair)
Ashley McMullin	2021-2024	DePaul University
Nestor Osorio	2017-2022	Northern Illinois University
Arlie Sims	2021-2024	Columbia College Chicago
Lesley Wolfgang	2019-2022	Saint John's College of Nursing

CARLI Board Liaison:

Spencer Brayton, Waubensee Community College

CARLI Staff Liaisons:

Elizabeth Clarage

Denise Green

Meetings:

The Public Services Committee met ten times by conference call.

Activities:

The Public Services Committee investigated Controlled Digital Lending (CDL). There was interest in this topic due to the effects of the COVID-19 pandemic on access to materials and explore solutions developed to ensure equitable access.

The Committee developed and then distributed a survey in December 2021 via the CARLI Public Services Interest Group, the Collections & Content Group, and E-Resources Group email lists. The survey received 41 responses with seven indicating their library had utilized CDL. The respondents indicated interest in shared experiences and practices from CARLI Libraries (87.8%), a resource guide (80.5%) and programming (48.8 %). The committee divided into two subcommittees—one focused on interviewing survey participants to identify potential panelists for the spring CDL panel discussion and the other created a CDL resource guide.

The interview subcommittee recorded CDL themes from six interviews. Factors affecting the decision to (not) use CDL included lack of knowledge; legal aspects and technical requirements; community needs during the pandemic; and how to restrict sharing. Barriers to implementing included protecting the file to meet copyright; time and staffing constraints; and the “own-to-loan” ratio. Some benefits of CDL included culture building; thinking creatively about fair use/access and creators’ rights; an option for oversized items that are difficult to lend or challenging to ship; and when e-books are not available and patrons are unable to come to campus.

The resource guide subcommittee investigated resources related to CDL. They identified roughly three dozen resources which they divided into the following topics: introduction with definition and recent background; introductory resources; position statements; implementation; legal; and future of CDL. The [Resources about Controlled Digital Lending](#) as shared from the CARLI web site.

The Committee conducted a panel discussion, *Controlled Digital Lending: A Discussion*, on Thursday, April 20, 2022 on Zoom. Chad Kahl and Cynthia Kremer co-moderated and Caitlin Archer-Helke and Ashley McMullin co-managed the chat. Devin Savage from Illinois Institute of Technology, Leslie Starasta from Lincoln Christian University, and Jennifer Sauzer from Columbia College Chicago were the panelists. The presentation attendance was 86. The program received very positive feedback:

- The content presented was of high quality: 12 strongly agree; 8 agree
- The session was a valuable use of time: 13 strongly agree; 8 agree
- The presenters were prepared, knowledgeable, and professional: 13 strongly agree; 8 agree

The [introductory panel presentation](#) and [notes were made available](#).

Respectfully submitted,
Members of the 2021-2022 CARLI Public Services Committee

CARLI Resource Sharing Committee

2021-2022 Annual Report of Activities

Members

- Elena Carrillo, University of Illinois at Chicago (2021-2024)
- Marissa Ellermann, Southern Illinois University Carbondale (2021-2024)
- Sarah Henderson, Monmouth College (2021-2024)
- Sarah Hoeksema, Trinity Christian College (2021-2023)
- Shelly McDavid, Southern Illinois University Edwardsville, co-chair (2019-2022)
- Janelle Sander, University of Illinois at Urbana-Champaign, co-chair (2019-2022)
- Caitlin Stewart, Illinois State University (2021)
- Ashtin Trimble, Black Hawk College (2018-2023)
- Erin Zimmerman, Heartland Community College (2019-2022)

Discovery Primo VE TF Liaison: Nathan Theborge, Trinity International University
E-Resources Management TF Liaison: Sara Rizzo, National Louis University

CARLI Staff Liaisons: Debbie Campbell and Bradley Woodruff

CARLI Board Liaisons: Dr. Sharon Silverman, Olive-Harvey College

Meetings

All of our meetings took place via Zoom on the first Tuesday of every month (9:00-10:30AM). Since the committee primarily meets online, our regular operations were not impacted by the varied work environments we were all in during the FY22 year (remote work, partially open institutions, transitions, and/or reopened institutions).

Completed Terms

The committee sends sincere thanks and appreciation to our dedicated committee members whose terms are ending this year.

- Shelly McDavid, Southern Illinois University Edwardsville, co-chair (2019-2022)
- Janelle Sander, University of Illinois at Urbana-Champaign, co-chair (2019-2022)
- Caitlin Stewart, Illinois State University (2021)
- Erin Zimmerman, Heartland Community College (2019-2022)

During the upcoming June 2022 meeting, the committee will select the committee co-chairs for the FY23 year.

Committee Charge

The CARLI Resource Sharing Committee works with the CARLI staff and members to identify, develop, and encourage cooperation and collaboration in sharing the full depth and breadth of the consortium's collective resources. The committee will identify efficient and cost-effective best practices. The Resource Sharing Committee will collaborate with other CARLI committees and ad hoc groups to discuss issues of common interest and to facilitate joint program planning.

The committee may be assigned projects by the Board of Directors, or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The Resource Sharing Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, equity, and inclusion (DEI), and will ensure that CARLI's commitment to DEI is embedded in their work. The committee will identify educational and training needs within its scope of responsibility and its collaboration with other committees, and will develop workshops, seminars, webinars, or other education opportunities to meet the needs of the membership. The committee will prepare appropriate documentation and reports, and will submit an annual report of its activities and accomplishments to the Board of Directors.

Theme

Growing familiarity with the Alma ILS alongside the Primo VE Discovery layer.

Annual Project

With the migration from Voyager to Alma, the Resource Sharing Committee focused their work in FY22 on multiple smaller projects instead of one larger research project. These projects are outlined below.

Monthly Alma and Primo VE Release Notes Review

Committee members took turns reviewing monthly Alma and Primo VE release notes, highlighting any upcoming changes that would impact resource sharing processes and workflows. Any relevant changes were documented, shared with the committee, and published to the CARLI website: <https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/ResSharReleaseNoteReview>

Discussion Series: CARLI Resource Sharing in our New Age: Tips and Tricks in the Time of Alma and COVID

To connect with our CARLI library colleagues during the FY22 year, the committee decided to host once-a-month virtual group discussions on varied topics, facilitated by committee members to get the conversation going. Following a brief presentation or introduction, attendees at these semi-informal sessions could participate in Q&A and topical discussion.

Discussion Series: October 29 Two Libraries' Different Approaches to Lost and Billed Materials Processes

The CARLI Resource Sharing Committee's October Discussion focused on using Alma Analytics reports and dashboards to process lost materials for billing and automatic transfer of fees to a campus system. The session started by hearing from two academic libraries and their different approaches to processing lost materials for billing. Janelle Sander of University of Illinois at Urbana-Champaign discussed automatic transfer of fines to an external bursar system and how that process impacts billing workflows. Shelly McDavid, from Southern Illinois University Edwardsville, demonstrated how leveraging customized dashboards and reports in Alma Analytics has enabled her library to start slowly working through current and future workflows for lost and billing processes. This session with 71 registrants was recorded and posted to the CARLI website: <https://www.carli.illinois.edu/ResourceSharingCommittee20211029>

Discussion Series: December 3 Course Reserve Management in Alma and in Leganto

The CARLI Resource Sharing Committee's December Discussion focused on course reserve management using Alma and Leganto. The session began with two academic libraries sharing their different approaches to reserves. Sarah Henderson, of Monmouth College, discussed using Alma course reserves in a small school setting. Belinda Cheek, of North Central College, talked about their implementation of Leganto and how it integrates with Alma course reserves. This session with 51 registrants was recorded. The recording was lost.

Discussion Series: February 18 Two Libraries using Alma Analytics for IPEDS and ACRL Reporting Data

The CARLI Resource Sharing Committee's February Discussion focused on using Alma Analytics reports and dashboards to crosswalk data from Alma Analytics reports and dashboards to the needed data for ACRL and IPEDS reporting agencies. Lisa Wallis from Northeastern Illinois University

demonstrated a data crosswalk of ACRL data to Alma Analytics reports and dashboards, and Shelly McDavid, from Southern Illinois University Edwardsville, demonstrated a crosswalk of IPEDS data to Alma Analytics reports and dashboards. Each presenter underscored the importance of involving the correct people at your library to ensure a clear baseline of understanding of backend set-ups, as well as the reality that not all reported data is found in Alma and will need to be gathered by others within your library. Importance was stressed on reviewing and understanding the ACRL and IPEDS reporting agencies data point definitions to ensure your data is accurate and has integrity. This session with 88 registrants was recorded and posted to the CARLI website:

<https://www.carli.illinois.edu/ResourceSharingCommittee-20220218>

Discussion Series: April 22 Alma Patron Proxies

The CARLI Resource Sharing Committee's April Discussion focused on Proxies and the ways three different libraries set them up and use them. Depending on local policies and patron needs, some libraries allow their users to designate another user to perform some circulation functions on their behalf. There are several ways to set up proxies in Alma, three of which were discussed in this webinar. Marissa Ellermann, from Southern Illinois University – Carbondale, demonstrated setting up local circulation proxies and some best practices and procedures to follow, including examples used at SIUC. Cheryl Grubb, from Wheaton College, discussed setting up proxies upon request from professors who want to enable teaching assistants to place AFN requests on their behalf. Janelle Sander, from University of Illinois – Urbana-Champaign, discussed the Fulfillment Proxy functionality that Ex Libris released to our Alma environments in December 2021. This session with 38 registrants was recorded and posted to the CARLI website: <https://www.carli.illinois.edu/ResourceSharingCommittee-20220422>

Alma and Primo VE testing and troubleshooting

During the FY22 year, the committee led and assisted CARLI office staff in testing and troubleshooting many aspects of Alma and Primo VE. A list of these tasks and topics includes:

- Alma and Primo VE configuration:
 - Automatic Renewals for I-Share patrons
 - CARLI Office staff held a webinar for enabling local renewals for local patrons on October 21: <https://www.carli.illinois.edu/alma-automatic-renewals-local-patrons>

- Survey was sent to I-Share member libraries in November; results favor waiting until Alma can send the patron a letter that their item was auto-renewed (functionality expected in 2022).
- “Item Availability” indicator on the Primo VE AFN/I-Share request form
 - Multiple committee members tested this functionality to assist CARLI Office staff in gauging its effectiveness/accuracy.
- I-Share Requesting over winter break
 - The committee discussed, and then the CARLI Board approved a winter break recommendation to turn off the ability to place new I-Share requests through Primo VE between 5pm on Thursday, December 23, 2021, and 8am on Sunday, January 2, 2022.
 - Whether to pause, or not, resource sharing will be re-evaluated for winter break 2023.
- Alma January Release Feature: Testing “Fulfillment Library Independence”
 - Members of the committee met with CARLI Office staff to test this setting in the UIC Sandbox in May 2022.
 - Initial testing shows this setting is not AFN-aware enough to encourage use by any I-Share library.
 - Further testing of additional Fulfillment Library Independence functionality will be conducted by committee members and CARLI Office staff in June 2022.
- Alma March Release Feature: Extend due date past patron expiry date
 - Following discussion, the committee is in favor of NOT enabling this setting for any I-Share library.
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2022/Alma_2022_Release_Notes?mon=202203BASE
- Alma Fulfillment configuration> Other Settings, “check_patron_duplicate_borrowing_requests”
 - Following discussion, the committee is in favor of having the CARLI Office staff adjust this setting to “false” to allow patrons to request multiple copies of the same title.
 - CARLI Office staff will send an announcement, and make this change in June 2022.
- Alma Configuration> Fulfillment job> Borrowing Activity Report Job
 - The committee will finalize their discussion of these related settings and letters in June 2022.
- Alma letters, letter formatting, and consortial intervals:
 - Ful Hold Shelf Request Slip Letter

- Adding “Hold Until Date” once ExL fixes bug related to SF case 06295346
 - Ful Lost Refund Fee Loan Letter
 - Turning on for all I-Share notices, with an option for libraries to turn off local notices
 - Return Receipt Letter (discussion will be finished at June 2022 meeting)
 - Mandatory on for I-Share vs Local notices
 - Providing institutions the ability to opt out of local notices
- Documentation
 - Reviewed the Best Practice Recommendations for Named Users in I-Share
 - Reviewed the Best Practice Recommendations for Creating Generic User Accounts in Alma for I-Share

**2021-2022 CARLI Technical Services Committee:
Annual Report of Activities**

Members:

Tammie Busch, Southern Illinois University Edwardsville
Jodi Craiglow, Trinity International University
Kathryn Dauksza, Illinois State Library, Co-Chair
Brent Eckert, Rock Valley College
Susan Howell, Southern Illinois University Carbondale
Megan Kelly, Newberry Library, Co-Chair
Robin Mize, University of Illinois at Springfield
Renata Schneider, DePaul University
Christa Strickler, Wheaton College

CARLI Board Liaison:

Taran Ley, Southern Illinois University School of Medicine

CARLI Staff Liaisons:

Jen Masciadrelli
Ted Schwitzner

2021-2022 Accomplishments:

- Shared Documentation Depository
 - <https://www.carli.illinois.edu/products-services/i-share/i-share-documentation/shared-documentation>
 - Building upon the work completed by the previous year's Committee to develop a site offering access to shared, locally created Alma documentation and workflows, the Technical Services Committee and CARLI staff sent requests for documentation to:
 - CARLI Technical Services Interest Group list serve via email
 - All CARLI members through the monthly newsletter

This year the Committee divided into two Subcommittees, one focusing on diversity, equity, and inclusion in authorities, and the other exploring best practices. In addition to the full Committee monthly meeting on the third Tuesday of each month, each Subcommittee met at least once a month to complete the work.

- **DEI Subcommittee**
 - The goal of the subcommittee was to explore solutions for two issues:
 - Changing the existing offensive subject headings display
 - Highlighting minority and underrepresented authors
- Changing existing offensive subject headings display: In a pilot project, CARLI identified and evaluated five different procedures successfully used by other institutions. The original

five procedures underwent testing in the Alma sandboxes. After the initial test, two options were identified that will require further assessment:

- Using display normalization and bib normalization rules together
 - Allows the preferred language to display using the display normalization (remove the display of objectionable headings in PrimoVE); Allows for searching of the preferred terms in the catalog.
- Using DEI Exclude and bib normalization rules together
 - Removes the objectionable terms from the display and adds the preferred terms to the database with the bib normalization (the terms will display and be searchable in PrimoVE). This option also changes CDI and Community Zone records.
- Both options have positive impacts changing display and searchability of terms in PrimoVE. However, a few questions remain regarding facet display, the impacts of system updates, and how the options function in the Network Zone. Further testing is needed to understand possible application at the consortium level and how implementation/maintenance would be managed.
- Highlighting minority and underrepresented authors: This approach emphasizes attribution & authorship categories (i.e. Assyrians, Pulitzer Prize winners, Naturalists, etc.). As implementation requires using MARC field 386 that does not currently display in Primo VE, the issue was referred to CARLI Primo VE task force to investigate possible display activation. The field, once active, would need to be populated with the Library of Congress Demographic Group Terms (LCDGT), and possibly, other vocabularies.
- Both goals require further assessment and detailed implementation strategies, and it is recommended that the subcommittee continue its work in the future, possibly becoming an advisory group.
- **Best Practices Subcommittee**
 - Documentation: Per CARLI's suggestion, the subcommittee reviewed, updated, and combined two CARLI cataloging documents, "Standards for Bibliographic Records in I-Share" and "Cooperative Cataloging Guidelines for I-Share," into a single best practices draft document to be reviewed by the larger TSC committee and eventually sent to the Board for approval.
 - Survey: The subcommittee composed a 13-question survey to learn about the comfort level of I-Share libraries' members with the Connexion cataloging tool and with their process of finding, editing, and creating bibliographic records. This information will be used to better inform the work of the larger Technical Services Committee and to design and offer training opportunities. The survey was released in March and has received 73 responses.

Future Plans:

The Technical Services Committee will continue meeting in FY23. The research and deliberation for the two current Technical Services Subcommittees will also move forward. The DEI Subcommittee will continue to monitor, identify and evaluate subject heading vocabulary updates and bib normalization procedures to recommend for future implementation by the CARLI membership. The Best Practices Subcommittee will complete and publish the "TSC Best Practices"

document. The full Technical Services Committee will evaluate the data from the 13 question survey to further guide the Committee best practices, projects and training.

Members of the Technical Services Committee express their continued gratitude for the work and support the CARLI staff provide in guiding and implementing the ideas put forward through the committee's research findings.

2021-2022 CARLI Technical Services Committee Annual Project: Shared Documentation Depository

<https://www.carli.illinois.edu/products-services/i-share/i-share-documentation/shared-documentation>

Shared Documentation Depository

Why reinvent the wheel? Projects are easier to begin with inspiration. It is easier to craft documentation from examples than to begin from scratch, and a depository is only as useful as its submissions.

This depository contains documentation submitted by CARLI member libraries, for the benefit of the broader community.

ABOUT THE DOCUMENTATION

Each document is noted with the topic, the name of the institution by whom it was submitted, the date it was added to the depository, the date the link was last checked for availability, and any notes.

Example:

Topic	Author	Date Added	Date Last Checked	Notes	Link
Work orders	CARLI Office	7/14/2021	8/1/2021	This document is for larger institutions that might have multiple service departments	How to: Using Work Orders in Alma

The documentation is not peer-reviewed; it is up to those using the documentation to determine whether the information is still valid, accurate, and of use for their purpose.

HOW TO SUBMIT

Do you have documentation to share? Please do!

New categories and subcategories will be added to this page as documentation is received.

Sample topics of documentation we'd love you to submit:

- Library privacy policy
- Library interlibrary loan policy
- Annual reports (internal for the library and/or external to stakeholders)
- Newsletters
- Library marketing and promotional materials
- Event descriptions
- Form templates
- Workflow visualizations
- Video tutorials
- How-to guides, such as how to use the OPAC, search databases, log in to services, find the library, etc.
- Other topics of interest

You can submit items for sharing [via this Smartsheet form](#). Before submitting, please make sure that you have appropriate permissions to share.

- To date, 57 documents have been submitted and published, covering nine different topic areas including:
 - Acquisitions
 - Analytics
 - Cataloging
 - eResources
 - Fulfillment
 - General
 - Primo VE
 - SIS
 - Users

***2021-2022 CARLI Technical Services Committee Annual Project:
Cataloging Survey***

1. Do you/any of your library's catalogers use OCLC Connexion/OCLC WorldShare Manage?
 - Yes
 - No
2. How often do you/your catalogers use Connexion/WorldShare Manage in your routine cataloging tasks?
 - Daily
 - A few times a week
 - A few times a month
 - Only sporadically
 - Never
3. Where do you/your catalogers look for new (non-NZ) bibliographic records for **print resources**?
 - Connexion/WorldShare Manager
 - Z39.50 searching (including "Search External Resources" in Alma)
 - Vendor-supplied records
 - Other
4. Please indicate sources for "Other" indicated in Question 3.
5. Where do you/your catalogers look for new (non-NZ) bibliographic records for **electronic resources**? (Please Rank in order of preference).
 - Alma CZ
 - Connexion/WorldShare
 - Vendor-supplied records
 - Other
6. Please indicate sources for "Other" indicated in Question 5.
7. Where do you start your search for bib records?
 - Alma Network Zone
 - Connexion/WorldShare
 - Vendor-supplied records

- Other (please specify)
8. Where do you/your catalogers create new bibliographic record (when creating from scratch)?
 - Alma
 - Connexion/WorldShare
 - Somewhere else
 - My library doesn't create new bib records
 9. How would you rate your/your catalogers' comfort level with using Connexion/WorldShare?
 - Very comfortable
 - Somewhat comfortable
 - Neutral
 - Somewhat uncomfortable
 - Very uncomfortable
 10. If Connexion training opportunities were offered, would you be interest in participating?
 - Very interested
 - Somewhat interested
 - Neutral
 - Somewhat interested
 - Very interested
 11. Other comments:
 12. Name (optional):
 13. Please select your I-Share Institution (optional):

Technical Service Cataloging Survey Results Summary

73 responses total

- 66 responses on the first day the survey was available
- 22 respondents included their name
- 54 respondents included their institution
 - 40 institutions
 - 6 institutions with 2 responses; 1 institution each with 3, 4, and 5 responses.
 - 19 respondents skipped the question
- 69 of 73 respondents use Connexion or WorldShare Metadata in their work
 - Daily: 37 (51.4%)
 - Few times/week: 20 (27.8%)
 - Few times/month: 9 (12.5%)
 - Sporadically: 2 (2.8%)
 - Never: 4 (5.5%)
 - One skipped the frequency question
- OCLC (Connexion/WorldShare) ranked as top source for print records
 - 58 ranked as #1, 12 ranked as #2 or #3 (6 respondents each)
 - Second ranked source is Alma's "Search External Records" function for Z39.50 searches.
 - Close third is vendor records

- Other is fourth but covers a lot of territory
 - Outsourcing copy cataloging: Backstage, Marcive
 - GPO for gov docs
 - temporary/brief records
 - "Community zone"
- Alma Community Zone ranked as the top source for electronic records
 - 38 ranked as #1, 19 ranked as #2
 - OCLC ranked second via the ranking score
 - 27 ranked OCLC #1
 - 23 ranked OCLC #2
 - 16 ranked OCLC #3
 - Other is fourth again
 - People used the Other box as a general comment, rather than elaborating much on sources.
- Catalogers predominantly start their search in the Alma NZ
 - 54 of 73 (74%) specified NZ
 - 17 of 73 (23.3%) specified OCLC as first search location
 - 2 responses (2.7%) answered Other. Both responses indicate that workflow dictates where they search.
 - If there is an existing brief record, then they continue in OCLC.
 - P vs E
 - Standalone E title vs. E title in collection
 - 0 responses for vendors as the starting point for cataloging
 - Maybe infer that catalogers responding saw acq vendors as a different process
 - Possible future questions here on likelihood to use vendor records
- Catalogers predominantly create new records in OCLC (3 skipped this question)
 - 50 of 70 responses (71.43%) specified OCLC
 - 12 of 70 (17.14%) specified Alma
 - We didn't ask about reasons why this might be. Possible future questions here.
 - 8 of 70 (11.43%) don't create new bib records
- Most respondents are comfortable with cataloging in OCLC tools
 - 47 of 73 (64.4%) ranked very comfortable
 - 17 of 73 (23.3%) ranked somewhat comfortable
 - 6 of 73 (8.2%) neutral
 - 3 of 73 (4.1%) somewhat or very uncomfortable
- Most respondents are interested in participating, or at least supportive of seeing training on OCLC tools in the Alma context
 - 57 of 73 (29-very, 28-somewhat) interested in participating
 - 13 of 73 neutral on training
 - Some of those responding neutral are somewhat or very comfortable with OCLC. Comments indicate that catalogers have been using OCLC for years, but recognize that there may be things they don't know or underuse.
 - Some of those who are neutral on OCLC training are also neutral or uncomfortable with OCLC.