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**CARLI Collection Management Committee:  
FY 2021 Annual Report of Activities and Projects**

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**Members**

David Bell, Co-chair	2018-2021	Eastern Illinois University
Daniel Blewett, Co-chair	2017-2021	College of DuPage
Chad Buckley	2017-2021	Illinois State University
Keith Eiten	2019-2022	Wheaton College
Kelli Getz	2018-2021	DePaul University
Paolo Gujilde	2018-2021	Northwestern University
Lorene Kennard	2019-2022	University of St. Francis
Niamh McGuigan	2020-2021	Loyola University Chicago
Scott Thomson	2019-2022	Rush University

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

**CARLI Staff Liaisons:** Elizabeth Clarage, Jen Masciadrelli

**Meetings**

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

**Review of Committee and CARLI Committee Structure**

As requested by the CARLI Board, the Committee reviewed its charge and activities. The Committee's recommendation to continue was accepted by the CARLI Board. In addition, the Committee recommended that a new group be created to focus on Discovery Services.

**Subcommittees**

The work of the committee has been conducted mostly by subcommittees. The Alma Analytics and Open Access eBooks subcommittees were largely on hold during the last year as the broader statewide transition to Alma/Primo was rolled out. CARLI officially took over the task of vetting Open Access eBook collections in the future, but a role is still envisioned for this committee in confirming the collections to be added to the statewide catalog.

**Update to Open Access Collection Criteria**

At the request of CARLI staff, the Collection Management Committee updated the criteria for open access materials to be added to the shared catalog. Formerly, the criteria focused solely on non-serial

materials. The former SFX Committee had developed similar criteria for serials. The updated version incorporates both types of materials in one document. It can be found on the CARLI website at: [https://www.carli.illinois.edu/products-services/collections-management/OA\\_eBooks](https://www.carli.illinois.edu/products-services/collections-management/OA_eBooks)

### **Weeding eBooks**

This subcommittee finalized their draft report and recommendations for best practices in this area for member libraries. Members conducted a literature review on the topic and provided a set of helpful guidance on when, how and why to weed eBooks. The full Committee plans to review and approve Ebook Weeding Recommendations at its June 2021 meeting. The draft document is appended.

### **Collection Development Directory**

This project was envisioned as a directory of statewide experts who could provide mentorship or guidance in various collection development areas. In practice, it gradually became clear that the creation of such a directory faced many obstacles and, if developed, ongoing challenges. While putting together a list of names coupled with each individual's area of expertise seems like a straightforward exercise, the utility of such a directory in terms of findability, how much it would be used, and how it would be maintained became matters of concern. Furthermore, since this project was first proposed, the IACRL has implemented a [directory project](#) that meets many of the same objectives, albeit across a wider spectrum of library expertise. After much discussion and reflection, the subcommittee members recommended that this project be discontinued. The impulse behind the project – namely connecting librarians around the state with others who can help them plan, prepare for, and conduct various collections-related tasks – seems to be best handled through a combination of informal networking, potentially coupled with using the broader directory being developed by IACRL. With these factors in mind, we suggest that the best way for this committee to help professionals connect, advise and/or seek advice from one another is to increase the visibility of the Collection Management Committee in statewide library circles through offering workshops, tutorials, and related events on topics of current interest to librarians with collections responsibilities.

### **Informal Chats**

One way the CMC tried to foster networking and sharing of expertise during FY21 was through offering a series of scheduled informal chat sessions over Zoom on selected collections-related topics. In addition to the networking aspect, these chats were intended to simply allow librarians across the state with an occasional opportunity to gather in one place, if only virtually, to maintain and continue a sense of professional community and solidarity. The loss of in-person meetings, conferences, workshops, and other events due to COVID-19 cancellations has left many academic librarians (like most everybody else) feeling isolated. These chat sessions were well-received and hopefully they will continue in one form or another. The overall title of these sessions was *Looking Back to Move Forward: Reflecting on a Challenging Year in Collection Management*. Below is a brief summary of the four sessions that were held in late 2020 and early 2021.

### **Brief Summary of Informal Chat Sessions**

**Friday, December 11, 2020, 11:00 a.m.–12:00 p.m.**

This session began with a poll on the following topics to determine what the group would most like to discuss. Due to the informal nature of these chats, they were not recorded.

- Budget allocation
- Open Access E-Resources
- Print Books (in particular issues surrounding circulating them during the pandemic)
- Reference Collections – how have they changed and what are trends are underway?
- E-Books
- Publisher discount programs (such as Oxford UP’s Clear Your Shelves program)
- Publishing innovations on the horizon that may affect our collection development practices
- Journals – publishing, access models including subscriptions, aggregated databases, open access, etc.
- Databases – selection, cost, title overlap
- The role of statewide consortia going forward in partnering with libraries on collection management

**Thursday, February 11, 2021, 3:00–4:00 p.m.**

The focus of the discussion at this session was management of streaming media. Niamh McGuigan and her colleague James Conley of Loyola University Chicago Libraries kicked off the discussion with brief presentations.

**Friday, March 12, 2021, 11:00 a.m–12:00 p.m.**

For this session, eBooks was the chosen topic. Janice Derr, head of Acquisitions at Eastern Illinois University, kicked off the discussion with a brief presentation

**Wednesday, April 14, 2021. 3:00–4:00 p.m.**

The fourth and final chat session focused on the present and future of reference collections. Traditional print collections and electronic formats provided by various vendors were discussed.

These informal chat sessions were, by all available accounts, well received and perceived as useful opportunities to share information and expertise among academic librarians across the state.

In FY22, the committee looks forward to continuing work on many of these ongoing projects. We also anticipate that the coming year will present many opportunities for new endeavors in the collections arena. The CMC and its members will undoubtedly continue to provide ongoing practical assistance, along with moral support and professional mentorship, to librarians with collections responsibilities across Illinois.

## **Weeding Ebooks - Recommendations**

### **CARLI Collection Management Committee, May 2021**

#### 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 although since Ugly is not relevant to ebooks, **MiSTIE** would perhaps be more accurate. 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.

Members of the CARLI Collection Management Committee drawing from their own experience decided that guidance would be helpful for all CARLI members that have aging ebook collections and the librarians and staff at those institutions.

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.

## 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** (Continuous Review, Evaluation and Weeding) 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. **MUSTIE** (Misleading/Ugly/Superseded/Trivial/Irrelevant/easily found Elsewhere) (or **MiSTIE** - without the Ugly component) is a helpful acronym for the factors to consider when reviewing a title for retention.

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.

Where is the best place to indicate retention decisions? Libraries need to develop procedures that indicate where decisions are noted. Is it within the catalog? Or, if an ebook remains accessible/in the collection, then is there an assumption that it passed the retention decision criteria? Also to be considered, what about special cases? Are there any library collection development policies that indicate the language used in records or the catalog?

## WEEDING RECOMMENDATIONS

- Reasons to weed e-books:
  - Content no longer relevant / retention policy
    - "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
- 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
- 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
- Who should be involved/consulted in the weeding process?
  - “Should the requestor type be a factor in the weeding of items? And if the requestor is a factor, requestor types themselves need to be prioritized...should the requestor be as important as the number of circulations?” (p. 87) - Crosetto
  - “...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
- Miscellaneous
  - Libraries may already have a weeding policy that can easily be applied to their e-book collection. (p. 26-28) - Moroni

## CHALLENGES

- “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
- 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

## RESOURCES/BIBLIOGRAPHY

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