CARLI

2016
Committee Reports &
Projects

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2015–2016 CARLI Collection Management Committee:
Annual Report of Activities

Members
Christophe Andersen, (2014-2017), Columbia College Chicago, **Co-chair-elect**
Jeffry Archer (2013-2016), University of Chicago
Deborah Blecic (2015-2018), University of Illinois at Chicago
Chris Diaz (2015-2018), National-Louis University, **Co-chair-elect**
Sally Gibson (2014-2016), Illinois State University
Jane Hopkins   (2013-2016), Greenville College
Kristina Howard (2014-2017), Prairie State College
Niamh McGuigan (2015-2018), Loyola University Chicago
Susan Prokopeak, (2013-2016), Joliet Junior College, **Chair**
CARLI Staff Liaisons: Elizabeth Clarage and Jennifer Masciadrelli

Meetings
The committee met monthly, with 3 in-person meetings at the CARLI Office in August and November 2015, and June 2016, the the rest conducted via conference call.

Sponsored Events
CARLI Print and Electronic Collaborative Collection Development Options for Monographs in AY17,
Webinar, May 9, 2016. 32 registered to attend.
Presenters and agenda available on the CARLI website: https://www.carli.illinois.edu/carli-print-and-electronic-cooperative-collection-development-options-monographs-ay17

Recording and presentations available on the CARLI website:
https://www.carli.illinois.edu/products-services/collections-management/collections-webinars

Accomplishments
- Reviewed and updated the CARLI Scholarly Communications website.
- Created survey for gathering information regarding collaborative collection development among the CARLI membership.
- Created summary of survey results for the committee's Annual Project.
- Developed and offered a webinar on Print and Electronic Collaborative Collections Development Options for Monographs.
- Created Google Groups for new and continuing collaborative groups based on survey analysis.

Future Objectives
- Work with CARLI members to facilitate collaborative collection development pilot projects in FY17.
- Continue to plan continuing education programs on collection management topics.
- Continue to cooperate and collaborate with other CARLI committees when possible, especially in the planning of continuing education events.

Executive Summary—June 2016

During 2015-2016, the Collection Management Committee (CMC) worked on a project to assess CARLI member libraries' interest in collaborating on collection development and to create a forum through which libraries could share information related to collection development and shared collections interests. The project involved a review of collaborative efforts made by other institutions, the development and administration of a survey, CARLI Collaborative Monograph Collection Interest Survey, to CARLI member libraries, analysis of the survey results, and offering a webinar which presented some of the options available to member libraries. The Collection Management Committee undertook the development of a collaborative site for CARLI members related to collection management.

Google Groups for CARLI Collaborative Collection Development:
https://groups.google.com/forum/?hl=en#!forum/carli-collaborative-collections

Webinar Summary

On May 9, 2016, the CARLI Collection Management Committee presented the webinar: CARLI Print and Electronic Collaborative Collection Development Options for Monographs in AY17.

Presenters:

- Jeffry Archer, Head, Reference Instruction and Outreach, University of Chicago
- Deborah Blecic, Collections Coordinator, University of Illinois at Chicago
- Chris Diaz, Collections Management Librarian, National-Louis University

Deborah Blecic, Collections Coordinator, University of Illinois at Chicago started the webinar with a summary of the findings of the CMC survey: Fifty-two libraries responded to the survey. Of the respondents eleven indicated that they were very interested and had resources (both time and money) that they could devote to a collaborative project. The areas of high interest included Health Sciences and Business with ten of the respondents indicating their interest in the subject area, followed by Education with nine respondents expressing interest in a collaborative project. Literature (eight respondents), Physical Sciences (six respondents), Computer Science/Math, and Fine Arts (five respondents each), and Social Sciences and History (four respondents each) represented the subject areas of high interest.

Blecic then provided an overview of the webinar topics including:

1. Print collaborative collection development options
2. E-book collaborative collection development options
3. Sample discussion in one subject area – Education
4. Possible next steps in the process

Blecic then provided three options for print monograph collaboration. The first option could involve each library committing to purchase a certain amount of unique content in a specific subject area (i.e.: $4,000 in physics for FY17) if that content had not been purchased by another CARLI library by six months after the publication date. This option would require minimal communication with other libraries other than the original selection of a subject area and basic monitoring via I-Share and/or OCLC.

The second option presented a model for collaborative print purchasing. In this model libraries would divide up a subject area (i.e.: selecting an artist or a historical movement) and collect extensively in the area selected. A variation of this model would have libraries in one area gather resources from select presses (i.e.: Library One could purchase all books by University Press A on a certain subject while Library Two agrees to cover University Press B). Agreements could be fashioned in any manner that would suit the participants and would likely cover a fixed amount of time.

The third option referenced was Demand Driven Acquisitions (DDA) for print materials. This option would involve the collaboration of multiple libraries with a common book vendor agreeing to purchase based on patron or library demand. The model would be the same as any local DDA except this would be across multiple libraries. Interested libraries would need to confirm if any additional license agreement would be needed to work with a group. In this model, all of the libraries would load the initial records into their catalogs. After a library has purchased an item based on a patron request the other libraries in the collaborative agreement will remove the record from their local catalog listing.

This portion of the webinar concluded that these are not the only options for print collaboration, and any option developed by the membership is an alternative as well. Deborah Blecic reiterated the idea that any effort to make the CARLI statewide collection and/or the I-Share collection stronger is welcome.

Jeffry Archer, Head of Reference Instruction and Outreach at the University of Chicago Library, presented e-book options for collaboration. An overview of the past consortial e-book DDA collaborative program was presented which included the following information about the cooperative collections:

1. The project cost was $893,431 managed by CARLI
2. All CARLI members had access to the MARC records within their local OPAC (or had the option to load the records)
3. 3858 books were purchased
4. Each item was allowed to be loaned 35 times per year
5. The agreement was adjusted during the project based on use of collection
    a. Triggers for short term loans adjusted

A possible future collaborative pilot could include several options based on the learning experience of CARLI's previous agreement with EBL. The group would continue with EBL as there is a negotiated agreement. If members wished to purchase materials from additional publishers, CARLI could work with EBL to confirm if they would participate. The cost to participating libraries for each title is two and a half times the single user e-book price and could only be used thirty five times within a twelve month period. The titles would be available to all CARLI members whether they contribute to the new collection or not.

Archer posed a number questions to consider before developing or participating in a collaborative e-book collection.

1. What is the scope of the project?
2. What is the necessary level of participation before contributing institutions benefit?
3. Is DDA or Direct purchase the preferred model?
4. Who makes the selections and how is that determined?
5. What is the communication and coordination plan (i.e.: how are duplications avoided)?

The scope of the project is perhaps the most important aspect of the project. The collaboration must be beneficial to all the contributing participants. Subject areas, publishers, readership level etc. must be

defined and agreed to by all participants. Equally important is the securing of financial commitments from all participants.

The financial considerations of an e-book collaboration include the cost of an e-book (2.5 times the list or single user e-book price), the point at which participants' access advantage outpaces their purchase price (the advantage starts with three participants in a pilot) and the increased purchase power of a large number of participants in a consortia effort. An example was provided illustrating the purchasing power of a leveraged buy to participants.

Direct purchases (DP) and DDA were compared

> DP (if approval based) requires active review
> DP allows for decisions at the title level based on individual selection
> DP requires coordination between CARLI and institutional selectors
> DP allows libraries to spend the exact amount desired
> DDA provides a wider range of titles for discovery
> DDA would more easily allow for a set budget number
> DDA allows for short term loans and may allow for purchase trigger adjustments
> DDA (as presently configured within CARLI) does not allow for limiting to certain local catalogs (patrons from all members would have access to select a DDA title)
> DDA requires use of CARLI resources to manage the process

A portion of the webinar showed how using GobiTween from YBP might facilitate collaboration among members to manage their selection process and share information with other CARLI members.

The next steps forward for a CARLI e-book collaborative project pilot as presented by Jeffry Archer for the Collection Management Committee include: self-identification of those institutions interested by subject area, a financial commitment by institutions interested in participating in a focused pilot, a resource (time and/or selector) commitment for working the pilot, and a continuing conversation and planning session (possibly a web meeting) for interested librarians/institutions.

The final presenter for the webinar was Chris Diaz, the Collections Management Librarian at National-Louis University. The presentation was entitled: Education.

This presentation started with an overview of a grant funded collaboration between nine Illinois libraries through the Illinois Cooperative Collection Management Program. The focus of the collection was "The Legacy of Brown versus Board of Education: Its Impact on Multicultural Education". The 2004 grant was $24,000 with participants receiving between $2500 and $4000 each. Each participating library selected subtopics with the entire project covering multiple subject areas within the multicultural education field including: administrative and legal issues, admissions, pedagogy and children's literature.

All participating libraries made purchased materials available for circulation via interlibrary loan and ILLINET. Each participating library agreed to catalog materials within six months of receipt at the institution and all participants agreed to communication guidelines including progress reports. The final reports and the collaborative collections were communicated via websites.

The webinar next covered the prospects for potential collaboration amongst Illinois libraries that offer undergraduate education programs. According to the websites of the National Council on Teacher Quality and CARLI, there are 40 colleges and universities in Illinois that participate in I-share and have undergraduate teacher preparation programs.

Potential education collaboration areas (based in part on the CMC Survey results) include:

Children's Literature
Teaching Kits
K-12 Textbooks
Education Policy
Diversity in Education
Higher Education
Common Core State Standards
Fine Arts Education
Early Childhood Education
Special Education

Chris Diaz then presented the Google Groups collaborative site and provided an overview of how collaborating on the site could work.

The webinar concluded with a discussion of the topics discussed facilitated by Jeffry Archer. Further information on coordination will be provided via the CARLI email list and on the Collection Management Committee discussion board: https://groups.google.com/forum/#!forum/carli-collaborative-collections

The results of the CMC Survey were shared with the survey participants (including a list of the participants and their collection interest areas). The survey summary was shared with participants on the webinar and is included in this project summary. And, a link to the webinar (and the individual presentations) was shared on the Collections Management portion of the CARLI website.

The Collection Management Committee plans to encourage participation by continuing to facilitate collaborative efforts including sending a follow-up e-mail to encourage participation in future conversations about collaborative efforts via participation in the Google Groups site (listed above).

CARLI Collaborative Collection Development: Results from a Survey
April 2016

Summary
The Collection Management Committee surveyed CARLI member institutions to explore the interest in collaborative collection development of monographs. The survey generated 89 responses from 52 CARLI member institutions.

Thirteen member libraries indicated previous involvement with collaborative collection development. The examples provided include agreements between institutions to collect music scores of contemporary composers, the publishing output of specific countries (such as Japan and Brazil), religious studies materials, and consortial eBook purchasing. The groups involved in these collaborative projects include Ivies Plus, the University of Illinois system, area studies librarians, the Association of Chicago Theological Schools, and CARLI.

Respondents indicated that lack of money and lack of time are likely to be the two biggest challenges for any collaborative collection development project within CARLI. The majority of respondents indicated significant budgetary constraints, and several respondents indicated key staffing limitations. Other potential barriers include technological constraints and the willingness of vendors to participate.

With regard to subject areas, the results show the highest interest in and viability for pilot projects in the subject areas of Health Sciences, Education, and Business.

CARLI members that are either "Very Interested" or "Extremely Interested" collaborative collection development and are able to commit both time and money (11):

- Benedictine University
- Blackburn College
- Catholic Theological Union
- Dominican University
- Illinois College of Optometry
- Illinois State University
- Loyola University Chicago
- National-Louis University
- Quincy University
- Trinity Christian College
- University of Illinois at Chicago

Subjects for Collaborative Collection Development

Subjects of Local Priority

Green refers to institutions **with both time and money** for collaborative collection development.
Blue refers to institutions **with time but no money** for collaborative collection development.
Red refers to institutions **with money but no time** for collaborative collection development.
Black refers to institutions that are either **not sure or cannot** contribute.

Health Sciences (10)
- College of DuPage (print)
- Illinois College of Optometry (eBooks)
- Eastern Illinois University (eBooks)
- Trinity Christian College (either)
- Quincy College (eBooks)
- Dominican University (either)
- University of St. Francis (either)
- University of Illinois at Chicago (either)
- Governors State University (print)
- Rush University (either)

Business (10)
- College of DuPage (print)
- Benedictine University (either)
- Eastern Illinois University (eBooks)
- Blackburn College (either)
- University of St. Francis (either)
- Joliet Junior College (either)
- University of Chicago (eBooks)
- Illinois Valley Community College (either)
- Trinity International University (either)
- Spertus Institute of Jewish Studies (eBooks)

Education (9)
- Benedictine University (either)
- University of Illinois at Urbana-Champaign (either)
- Eastern Illinois University (eBooks)
- Trinity Christian College (Print)
- National Louis University (eBook)
- Lake Forest College (either)
- Dominican University (either)
- University of St. Francis (either)
- University of Illinois at Chicago (either)

Health Sciences (15)
- Illinois College of Optometry (eBooks)
- DePaul University (eBooks)
- Quincy College (eBooks)
- Dominican University (either)
- Illinois Institute of Technology (either)
- South Suburban College (print)
- University of St. Francis (print)
- Triton College (print)
- University of Illinois at Chicago (either)
- Elmhurst College (eBooks)
- Joliet Junior College (either)
- University of Chicago (eBooks)
- Illinois Valley Community College (either)
- Governors State University (either)
- Rush University (either)

Computer Science and Mathematics (8)
- University of Chicago (eBooks)
- Knox College (eBooks)
- DePaul University (eBooks)
- Illinois Institute of Technology (either)
- Illinois Math and Science Academy (either)
- South Suburban College (print)
- University of Illinois at Chicago (either)
- University of St. Francis (either)

Physical Sciences (8)
- Blackburn College (either)
- Quincy College (eBooks)
- Lake Forest College (either)
- Illinois Institute of Technology (either)
- Illinois Math and Science Academy (either)
- Triton College (print)
- Joliet Junior College (either)
- Illinois Valley Community College (either)

Literature (8)
- Trinity Christian College (Print)
- Lake Forest College (either)
- Blackburn College (either)
- Triton College (print)
- Southern Illinois at Edwardsville (either)
- Roosevelt University (either)
- Joliet Junior College (either)
- Illinois Valley Community College (either)

Physical Sciences (6)
- Eastern Illinois University (eBook)
- Quincy College (eBook)
- Illinois Institute of Technology (either)
- Illinois Math and Science Academy (either)
- University of St. Francis (either)
- Illinois Valley Community College (either)

Computer Science and Mathematics (5)
- University of Chicago (eBooks)
- Knox College (either)
- Quincy College (eBooks)
- Illinois Institute of Technology (either)
- Illinois Math and Science Academy (either)

Fine Arts (5)
- Knox College (either)
- University of Illinois at Chicago (either)
- Lake Forest College (either)
- Illinois Institute of Technology (either)
- Southern Illinois at Edwardsville (either)

International Studies / Social Science (4)
- College of DuPage (print)
- Eastern Illinois University (eBooks)
- Blackburn College (either)
- University of Illinois at Chicago (Print)

History (4)
- Trinity Christian College (Print)
- Lake Forest College (either)
- Illinois Math and Science Academy (either)
- Southern Illinois at Edwardsville (either)

Religion (7)
- Benedictine University (either)
- Trinity Christian College (either)
- Catholic Theological Union (either)
- JKM Library Trust (eBooks)
- University of St. Francis (print)
- Trinity International University (either)
- Spertus Institute of Jewish Studies (either)

International Studies / Social Sciences (6)
- Southern Illinois at Edwardsville (either)
- Dominican University (either)
- University of Illinois at Chicago (print)
- University of Chicago (either)
- University of Illinois at Urbana-Champaign (eBooks)
- Trinity Christian College (either)

History (6)
- College of DuPage (print)
- Knox College (either formats)
- Lake Forest College (either)
- Blackburn College (either)
- South Suburban College (print)
- Southern Illinois at Edwardsville (either)

Education (5)
- University of Illinois at Urbana-Champaign (either)
- Trinity Christian College (Print)
- National Louis University (either)
- University of St. Francis (print)
- Rend Lake College (either)

Fine Arts (5)
- Trinity Christian College (Print)
- Knox College (either)
- Lake Forest College (either)
- Southern Illinois at Edwardsville (print)
- Elmhurst (print)

Literature (4)
- University of St. Francis (print / YA lit)
- Triton College (Print/ YA lit)
- Southern Illinois at Edwardsville (eBooks / plays)

General Education / Test Prep (4)
- Illinois Math and Science Academy (either)
- Joliet Junior College (eBook)
- Loyola University Chicago (eBook)
- Illinois Valley Community College (either)

Criminal Justice (3)
- Quincy College (eBooks)
- Southern Illinois at Edwardsville (either)
- Trinity International University (either)

Psychology (2)
- Trinity Christian College (Print)
- National Louis University (eBooks)

Religion (3)
- Catholic Theological Union (either)
- JKM Library Trust (either)
- Spertus Institute of Jewish Studies (eBook)

Foreign Language (1)
- Quincy College (eBooks)

Other (1)
- The University of Illinois at Urbana-Champaign is interested in collaboratively collecting scholarly books from University Presses in print and/or electronic formats

- Joliet Junior College (either)

Business (6)
- Benedictine University (either)
- South Suburban College (Print)
- Elmhurst (eBooks / marketing)
- Joliet Junior College (either)
- University of Chicago (eBook)
- Illinois Valley Community College (either)

General Education / Test Prep (5)
- Western Illinois University
- Illinois Math and Science Academy (either)
- Triton College (print)
- Joliet Junior College (either)
- Illinois Valley Community College (either)

Criminal Justice / Law (4)
- DePaul University (either)
- Quincy College (eBooks)
- University of Chicago (either)
- Southern Illinois at Edwardsville (eBooks)

Humanities (2)
- Illinois Institute of Technology (either)
- Loyola University Chicago (eBooks)

Psychology (3)
- Trinity Christian College (print)
- National Louis University (either)
- University of Chicago (either)

In support of this kind of project:

- **"**Having participated in collaborative monograph collections projects in the past, I really miss the networking opportunities with other I-Share colleagues in related areas. Even if the collaborative projects aren't possible in the current budget situation, trying to bring together subject librarians would be useful!"
- **"**We'd just be interested in learning more - this sounds like it has potential!"
- **"**I love that CARLI is looking at collaborative collection development, especially given our fiscally challenged times."
- **"**This is a useful survey, and I hope the information will be shared."

Demand-driven acquisitions:

- "I'm primarily interested in the kind of patron-driven ebook purchasing that was funded recently by CARLI. That project resulted in the first ebooks that our students have ever really wanted to use!"
- "We would only be interested in PDA collaborations."
- "Perhaps an extension of CARLI's print demand driven model for specific subject areas. We would certainly be interested in collaborative collection development for ebooks since those purchased independently by CARLI member libraries are unavailable to patrons at other institutions."
- "I would love to see another patron-driven ebook acquisition program like the one sponsored by CARLI a year ago. That provided additional books that all consortial libraries could access. That offers hope at a time when materials budgets are slim to none across the state."

Interest in Other forms of CARLI member collaboration:

- "I would be more interested in different types of shared collection development and/or management. Thoughts include a "last copy" project for media; digital preservation; supporting open access monographs such as Knowledge Unlatched."

Realities to consider:

- "We are always interested in CARLI collaboration, but the current budgetary climate may hamper our ability to participate."
- "We would have to evaluate cost-benefit very carefully."
- "Faculty members' research interests overlap. We end up having to purchase our own copies. The idea of sharing collections is not always welcomed by faculty members"
- "We are part of CARLI, but not I-Share, so maintaining access through the catalog could be challenging. It also represents a cultural shift and loss of control over the long-term preservation of the content (e.g., if another library is holding print content, what happens when they want to withdraw it?). We are spread thin with other projects, and may not have time to contribute to another one."
- "I think it really depends on the intent and details of the collaboration. In some cases (like the five priorities mentioned above), we might want to collaborate if the point would be for us to have expanded access to subject content, whereas for other areas it might be so that we could potentially commit to spending less but maintaining similar access."

Members
Susie Bossenga (2013-2016), Midwestern University, **Chair**
Chad Buckley (2014-2017), Illinois State University
Denise Cote (2014-2017), College of DuPage
Luann DeGreve (2013-2016), Benedictine University
Lynnette Fields (2015-2018), Southern Illinois University, Edwardsville
Ann Johnston (2014-2017), Olivet Nazarene University
Hilary Meyer (2015-2018), Triton College
Heather Parisi (2015-2018), Dominican University
Charles Uth (2013-2016), Illinois Institute of Technology
CARLI Staff Liaisons: Mary Burkee and Cindy Clennon

Highlights of Activity

Electronic Resource Proposal Evaluations
The CPC received 12 proposals in FY2016. Of those proposals, ten were rejected, one was accepted, and one is still under discussion. This was a challenging year for reviewing proposals, many libraries were cutting their materials budgets, and as many of the proposals we received were for more specialized products. There were some proposals that the committee felt were good products, which had it not been for the financial challenges faced by many CARLI libraries, would have been worth accepting.

Annual Project: Usage Statistics Resources Webpage
The Committee created a webpage with helpful information and resources related to usage statistics available at https://www.carli.illinois.edu/products-services/eres/usage-statistics. The website includes links to helpful information about the usage statistics from specific vendors that CARLI works with, including recordings or slides of the webinars the Committee sponsored in which vendors discussed the usage reports they offered and how to access them. The website also offers links to information on tools used to manage electronic resources, including open source and commercial ERMS products. Finally, the website includes additional resources, such as links to COUNTER and SUSHI information, helpful articles, and slides from past year's usage statistics forums. The Committee hopes that other librarians will contribute additional resources that they have found helpful so that the page will continue to grow.

CARLI Selection System
During an in-person meeting in February, committee members helped CARLI staff test the new selection system interface that is set to go live with the spring selection cycle. Members were given a list of test selections to perform and then provided feedback and reported problems with the interface to CARLI staff.

Usage Statistics Webinars
The Committee continued with last year's plan to offer a series of webinars in which major vendors discuss the usage data they offer and how to use their usage statistics portal. The Committee added to last year's webinar from Alexander Street Press with webinars from EBSCO on November 17, 2015 and from

ProQuest on March 8, 2016. Information from the webinars is posted on the Usage Statistics page created as our Annual Project. The Committee has plans to offer an additional webinar from Gale later in the summer of 2016.

Future Activities
- The Committee plans to work with additional vendors to continue with the series of usage statistics webinars begun this year. All webinars will be archived on a page on the CARLI website along with links to additional resources related to usage statistics.
- The Committee would like to explore new pricing and/or packages for e-journals.

Commercial Products Committee Annual Project
Usage Statistics for Electronic Resources

The Commercial Products Committee created a usage statistics resource page that is available on the CARLI website at https://www.carli.illinois.edu/products-services/eres/usage-statistics. It provides libraries with information on collecting and analyzing usage statistics for e-resources. The page includes recordings of the webinars in which vendors explain how to use their usage statistics portal. It contains links to information about both commercial and open source ERMs. It also includes links to helpful resources, such as the COUNTER Code of Practice and the SUSHI Protocol. The intention is that the site will continue to be updated and added to so that it can serve as a resource for librarians looking for information about current practices.

Usage Statistics for Electronic Resources

This page is provided on behalf of the CARLI Commercial Products Committee and is intended to serve as a resource for CARLI libraries in gathering usage statistics information related to CARLI e-resources vendors. Electronic resources usage statistics information from previous CARLI programs is available as well as relevant articles that may be useful to member library personnel. Please feel free to send usage statistics programming ideas and other relevant resources for inclusion on this page to the CARLI Office (mailto:support@carli.illinois.edu) .

expand / collapse all

CARLI Vendor Resources

Alexander Street Press

Alexander Street Press admin website (http://ADMIN.ALEXANDERSTREET.COM/)

ASP Legacy Statistics (http://stats.alexanderstreet.com/)

Alexander Street Press: Usage Statistics, Understanding our sites and reports

Watch the webinar (http://urldefense.proofpoint.com/v2/url?u=https-3A__astreetpressevents.webex.com_astreetpressevents_lsr.php-3FRCID-3Df35259915a70405c9b85f75f07643c1b&d=AwMFAw&c=8hUWFZcy2Z-Za5rBPlktOQ&r=-qYpdsKJ_ig1N2V5N3g3Br2WbT8kX8I23UpyNgFaH8E&m=vEuHCrIfLx1z5VJwsejIEta8CT0CrZt61gOdSlgJY6Y&s=mvcw5Jr_VvlYKiZIBh7dAOSo9qq8AENXONOF5ynbGVo&e=)

Presented on June 9, 2015 by Audrey DeGregorio (mailto:adegregorio@alexanderstreet.com) , Director, Account Management

Having trouble pulling Alexander Street usage statistics? Forgot that Alexander Street has two different statistics sites? Never pulled Alexander Street usage statistics before? Audrey DeGregorio, Director, Account Management, will help sort all of these issues out by discussing Alexander Street's two active statistics sites and the differences between them. Her 30 minute presentation will cover where to look for your usage stats, the reports you can pull, the difference between the sites and more.

ALEXANDER STREET PRESS: HOW SHALL WE REPORT ROI ON VIDEO? CAN WE?

Presentation Slides (http://www.carli.illinois.edu/sites/files/e-resources/ASPReportingROIforVideo.pdf)

Presented on June 16, 2015 by David Parker (mailto:dparker@alexanderstreet.com) , Vice President, Editorial and Licensing

Return-on-Investment (ROI) is a term popularized in board rooms and managerial accounting courses. ROI assumes, at its most basic level, that there is a clear measure of return for each dollar invested. In the case of video usage, ROI assumes you can capture the relationship between dollars spent and value derived. But the measure of value most of us are relaying on-number of views-is inherently flawed or, at minimum, incomplete as it does not capture the impact of a view (i.e. power to influence a viewer) nor does it capture the number of eyeballs for a particular view. David Parker will expand on these points during his presentation.

EBSCO

Log in to the EBSCO Admin web site (http://eadmin.ebscohost.com/)

Retrieving Statistics Help Sheet (http://support.ebsco.com/knowledge_base/detail.php?id=3829)

Database Usage Report Help Sheet (http://support.epnet.com/knowledge_base/detail.php?id=3546)

EBSCOhost Statistics for CARLI

Watch the Webinar (https://ebscotraining.webex.com/ebscotraining/lsr.php?RCID=9f5a581ce3964075 819bb6287ed1b589)

Presented on November 17, 2015 by Joe Ceterski (mailto:jceterski@ebsco.com) , Training Specialist, EBSCO Information Services

Gale

Log into the Gale Admin web site (http://admin.galegroup.com/galeadmin/login.gale)

Gale Cengage Usage Tutorial (http://solutions.cengage.com/gale-training/video/gale-usage-website)

ProQuest

Log in to the ProQuest Administrator Module (http://admin.proquest.com/login)

ProQuest Usage Training for CARLI Libraries (https://www.carli.illinois.edu/sites/files/e-resources/documentation/160316ProQuestUsageReportsTraining.pdf)

Usage Questions from CARLI Libraries (https://www.carli.illinois.edu//sites/files/e-resources/documentation/160330ProQuestWebinarFAQ_Usage.pdf)

Training Webinar for ProQuest Customers (http://www.proquest.com/customer-care/training-webinars/)

Managing Electronic Resources

CORAL Open Source ERMS for Libraries

CORAL Product Overview (http://coral-erm.org/)

CORAL Usage Statistics Demo (https://www.carli.illinois.edu/sites/files/coll_man/CARLI_Usage_Statistics_Seminar_%20CORAL.pdf)
Andrea Imre, Southern Illinois University Carbondale and Steve Oberg, Wheaton College
CARLI Usage Statistics Forum, November 22, 2013

EBSCOnet ERM Essentials

General information (http://www2.ebsco.com/hi-in/ProductsServices/ERM/Pages/ERMInfo.aspx)

User Guide (http://support.epnet.com/knowledge_base/detail.php?id=4778)

ERMes

About ERMes (http://murphylibrary.uwlax.edu/erm/)
General information from Murphy Library, University of Wisconsin-LaCrosse

ExLibris Verde

General Product Overview (http://www.exlibrisgroup.com/category/VerdeOverview)

ExLibris USTAT

USTAT Demonstration (https://www.carli.illinois.edu/sites/files/coll_man/112213-CARLIUStat2UsageForum.pdf)
Anita Foster, Illinois State University
CARLI Usage Statistics Forum, November 22, 2013

Innovative Sierra

General Product Overview (https://www.iii.com/products/sierra/eresource-management)

Self Managed Systems

Galvin **L**ibrary **E**lectronic **R**esources **U**sage **S**tatistics (GLERUS) (http://www.carli.illinois.edu/sites/files/e-resources/documentation/160330GLERUS.pdf)

GLERUS php (http://www.carli.illinois.edu/sites/files/e-resources/documentation/160330glerusphpEx.php.txt)

GLERUS sql (http://www.carli.illinois.edu/sites/files/e-resources/documentation/160330glerusSQLEx.sql)

Serials Solutions

360 Core informatio (http://www.proquest.com/libraries/academic/management-solutions/360-Core.html) n

360 Core Resource Manager (http://www.proquest.com/libraries/academic/management-solutions/360-Resource-Manager.html)

SFX

General Product Overview (http://www.exlibrisgroup.com/category/SFXOverview)

Overview of SFX for CARLI Libraries (https://www.carli.illinois.edu/products-services/link-resolver-sfx)

SFX Usage Statistics Demonstration (http://www.carli.illinois.edu/sites/files/coll_man/112213-UsageStats_SFX.ppt)
Denise Green, CARLI Usage Statistics Forum, November 22, 2013

Useful Links and Other Resources

Bucknell, T. (2012). Garbage In, Gospel Out: Twelve Reasons Why Librarians Should Not Accept Cost-per-Download Figures at Face Value. Serials Librarian, 63(2), 192-212. doi:10.1080/0361526X.2012.680687

LIB STATS (https://www.jiscmail.ac.uk/cgi-bin/webadmin?A0=LIB-STATS)

National Information Standards Organization (NISO) (http://www.niso.org/home/)

Project Counter - Counting Online Usage of NeTworked Electronic Resources (http://www.projectcounter.org/)

Standardized Usage Statistics Harvesting Initiative (SUSHI) (http://www.niso.org/workrooms/sushi/)

SUSHI Server Registry (http://www.niso.org/workrooms/sushi/registry_server/)

USUS – a community website on library usage (http://www.usus.org.uk/)

Past Usage Statistics Webinars and Events

Usage Statistics for Electronic Resources Webinar Series

The Commercial Products Committee is hosting a series of webinars on usage statistics presented by some of the CARLI vendors offering products to our members. Future webinars will be scheduled and announced as details become available. These webinars are open to any staff of CARLI member libraries. Future webinars will be scheduled and announced as details become available.

Alexander Street Usage Statistics, Understanding our sites and reports

Watch the webinar (http://urldefense.proofpoint.com/v2/url?u=https-3A__astreetpressevents.webex.com_astreetpressevents_lsr.php-3FRCID-3Df35259915a70405c9b85f75f07643c1b&d=AwMFAw&c=8hUWFZcy2Z-Za5rBPlktOQ&r=-qYpdsKJ_ig1N2V5N3g3Br2WbT8kX8I23UpyNgFaH8E&m=vEuHCrIfLx1z5VJwsejIEta8CT0CrZt61gOdSlgJY6Y&s=mvcw5Jr_VvlYKiZIBh7dAOSo9qq8AENXONOF5ynbGVo&e=)

Presented on June 9, 2015 by Audrey DeGregorio (mailto:adegregorio@alexanderstreet.com) , Director, Account Management

HOW SHALL WE REPORT ROI ON VIDEO? CAN WE?

[Presentation slides (http://www.carli.illinois.edu/sites/files/e-resources/ASPReportingROIforVideo.pdf)](http://www.carli.illinois.edu/sites/files/e-resources/ASPReportingROIforVideo.pdf)

Presented on June 16, 2015 by [David Parker (mailto:dparker@alexanderstreet.com)](mailto:dparker@alexanderstreet.com) , Vice President, Editorial and Licensing

EBSCOhost Statistics for CARLI

[Watch the Webinar (https://ebscotraining.webex.com/ebscotraining/lsr.php?RCID=9f5a581ce3964075 819bb6287ed1b589)](https://ebscotraining.webex.com/ebscotraining/lsr.php?RCID=9f5a581ce3964075819bb6287ed1b589)

Presented on November 17, 2015 by [Joe Ceterski (mailto:jceterski@ebsco.com)](mailto:jceterski@ebsco.com) , Training Specialist, EBSCO Information Services

ProQuest Statistics for CARLI

[ProQuest Statistics Usage Training for CARLI Libraries (http://www.proquest.com/customer-care/training-webinars/)](http://www.proquest.com/customer-care/training-webinars/)

 [Webinar Slides (https://www.carli.illinois.edu/sites/files/e-resources/documentation/160316ProQuestUsageReportsTraining.pdf)](https://www.carli.illinois.edu/sites/files/e-resources/documentation/160316ProQuestUsageReportsTraining.pdf)

Usage Statistics Forum

The [Usage Statistics Forum (http://www.carli.illinois.edu/products-services/eres/stats-forum-112213)](http://www.carli.illinois.edu/products-services/eres/stats-forum-112213) , held in November 2013, featured a variety of presentations and product demonstrations from CARLI member library personnel, intended for individuals working with electronic resources and collection development. Presentations included "What's the Big Deal? Supporting renewal decisions for large journal packages" and "Measures of Journal Use-A Comparison of Vendor, Link-Resolver, and Local Citation Statistics – and What It Can Tell Your Library".

Members:
Ian Collins (2015-2018), University of Illinois at Chicago
Ellen Corrigan (2014-2017), Eastern Illinois University
Alice Creason (2014-2017), Lewis University, **Chair**
Margaret Heller (2013-2017), Loyola University Chicago
Sarah Prindle (2015-2018), Southern Illinois University Carbondale
Mary Rose (2013-2016), Southern Illinois University Edwardsville (resigned)
Anne Shelley (2013-2016), Illinois State University
Adam Strohm (2013-2016), Illinois Institute of Technology
Jennifer Wolfe (2015-2016), Newberry Library
CARLI Staff Liaisons: Amy Maroso and Elizabeth Clarage

Communication
The Created Content Committee met monthly on one-hour conference calls. There was one in- person
meeting of the committee held at the CARLI Office in August 2015. The committee uses an email list
for group communication and maintains a wiki
(http://wiki.carli.illinois.edu/dcug/index.php?title=Created_Content_Committee) as collaborative
workspace.

Completed Projects

Updated Procedures for Google Analytics Usage Reports for CARLI Digital Collections
In Fall 2015 the Created Content Committee decided to switch methods for collecting Google
Analytics Traffic Sources and Keywords. The committee decided to no longer release written reports
for Traffic Sources and Keywords, and will instead release the entire dataset in Excel with some initial
cleanup and formatting. This will allow institutions to create their own reports out of the data.

Keyword and Traffic reports using the new Google Analytics data presentation were produced for
the first three quarters of 2015-2016 (July 2015 – March 2016). These are posted on the CARLI
website: http://www.carli.illinois.edu/products-services/contentdm/google-analytics- usage-reports-
carli-digital-collections.

CARLI Digital Collections Homepage Changes
The committee suggested changes to the way users navigate some pages of CARLI Digital Collections.
Prior to the change, navigating the site using the predefined "by topic," "by media," "by institutions,"
or "by collection" browsing options would take users to a collection's information page (example:

http://collections.carli.illinois.edu/cdm/singleitem/collection/carli_colls/id/32/rec/8). This page featured a prominent link near the top of the page to "Browse the collection" and would take users directly to a collection's browse page (example: http://collections.carli.illinois.edu/cdm/search/collection/sie_kmox).

The committee decided to change the link to take users to a collection's home page (example: http://collections.carli.illinois.edu/cdm/landingpage/collection/sie_kmox) instead, since home pages contain additional information about the collection that might be useful to users. A direct link to the browse pages is still present on the collection information pages, but not in such a prominent location.

CARLI Digital Collections Tagging Pilot Project
In anticipation of the 20th anniversary of the Million Man March, committee member Mary Rose requested the committee do a pilot project of CONTENTdm's tagging function for Southern Illinois University at Edwardsville's EBR Million Man March collection (http://collections.carli.illinois.edu/cdm/landingpage/collection/sie_mmmarch). The committee was interested to see if tagging function would be used by visitors to the site.

CARLI staff turned the tagging function on for only the EBR Million Man March collection and Mary Rose added many tags to the collection's images. The feature was promoted as being available for use, and CARLI staff monitored tagging activity for several weeks. At the end of the pilot, only one additional tag had been added to the collection.

The tagging function was turned off for the collection at the end of November 2015. The committee reviewed the pilot and decided that tagging was not a feature users were interested in, and it would not be used for CARLI Digital Collections at this time.

Continued Projects
The Created Content Committee continued work on several on-going projects:

CARLI Digital Collections Featured Image
Every two weeks a committee member selects an item from CARLI Digital Collections (http://collections.carli.illinois.edu) and posts information and commentary about the item on the CARLI Website as a news article.

CARLI Digitized Book of the Month
The same general procedures as followed for the Featured Image are now also being used for a book that has been digitized via the Open Content Alliance and available on the Internet Archive. This featured book is posted on the CARLI website monthly.

Podcasts
Podcasts are done by members of the committee and hosted on the University of Illinois at Urbana-Champaign's iTunes U account at: https://itunes.apple.com/us/itunes-u/carli- created-content-committee/id863218315?mt=10.

Three podcasts were produced this year: A discussion between committee members about their new Tumblr initiative (see "Current Projects" for more information); an interview with Sandra Fritz and Andrew Bullen about the Illinois' Digital Public Library of America participation; and an interview with Eric Kurt, the Media Commons Coordinator at University of Illinois at Urbana-Champaign's Undergraduate Library.

Current Project
Building on the digital collection use and marketing survey the committee did last year, the Created Content Committee proposed to investigate ways to assist CARLI institutions with promotion and marketing of the digital collections.

The committee decided to expand the marketing work they are currently doing and chose to start a Tumblr blog for promoting CARLI digital collections. It can be found at: http://carlidigcoll.tumblr.com/

The Tumblr page was created to compliment the the "featured images" and "featured books" which are posted only to the CARLI website and, therefore, don't see as big of an audience as could be gained from non-consortium-specific exposure.

Future Projects
Nearly all the continued committee projects will continue into the future. In addition, the committee plans to hopefully work with CARLI management to expand the numbers of collections that can be posted to the Tumblr page.

The committee will also review the digitization resources that were part of the CARLI wiki (https://wiki.carli.illinois.edu/index.php/Main_Page) to edit them and create a list of useful resources that can be added to the CARLI website.

FY16 CARLI CCC Whitepaper: The CARLI Digital Collections Tumblr

CARLI Digital Collections

Featured items from CARLI (Consortium of Academic and Research Libraries in Illinois) Digital Collections

http://collections.carli.illinois.edu

Women's Archery | University of Illinois at Chicago | CARLI Digital Collections

One of the site's most popular posts, with 47 notes (i.e. likes and re-blogs)

INTRODUCTION

In early 2015, the CARLI Created Content Committee conducted a survey of CARLI member institutions about the use and marketing of digital collections, particularly the CARLI Digital Collections published in CONTENTdm.[1] As one of the outcomes of the survey, the Created Content Committee proposed to investigate ways to assist CARLI institutions with promotion and marketing of the digital collections.

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[1] CARLI Created Content Committee (2015). A Survey of the Use of CARLI Digital Collections. Retrieved from https://www.carli.illinois.edu/sites/files/files/2015CreatedContent_SurveyUseDigitalCollections.pdf

From 2008-2013, the Digital Collections User Group (DCUG) wrote and published a bi-weekly "featured image" from the digital collections on the CARLI website. After the DCUG was discharged in 2013, the newly formed Created Content Committee continued the "featured image" posts for the CARLI website and also revived a monthly "featured digitized book" post starting in 2015. Although the committee regards these regular features as part of its marketing efforts to expose the digital collections to a broader user base, the committee felt this did not go far enough to reach an audience beyond CARLI member libraries.

As a result, the Created Content Committee chose to start a Tumblr blog on a trial basis for promoting CARLI digital collections in addition to the bi-weekly "featured image" posts on the CARLI website. Tumblr is a microblogging site that combines the publishing tools of a blog with social media tools that allow users to easily share and engage with content on Tumblr. Many libraries, archives, and special collections are using Tumblr to meet users where they are, attract new audiences, increase awareness of collections, and grow existing relationships.[2]

PROJECT OUTLINE

The project started in fall 2015 with an initial working group of Jen Wolfe (Newberry Library), Alice Creason (Lewis University), and Margaret Heller (Loyola University Chicago). Jen Wolfe was the only committee member with prior experience working with Tumblr. She started by creating a Gmail account and then establishing a Tumblr account for the committee. She also drafted an initial structure and plan for posting to Tumblr in a shared Google doc. Then the working group created three weeks of sample posts to share with the committee for discussion.

Before creating a Tumblr account, the decisions that need to be made upfront include the title of the Tumblr and the URL. In the case of institutional Tumblrs, most libraries, archives, and special collections use the name of their institution, department, or organization as the title and some form of the institution or department name as part of the URL. For example, the Special Collections and University Archives department at the University of Illinois at Chicago has a Tumblr titled "Special Collections and University Archives, UIC" and the URL is http://uicspecialcollections.tumblr.com/. The committee followed this practice for the pilot project and simply titled the Tumblr "CARLI Digital Collections" and established the URL as http://carlidigcoll.tumblr.com/.

One of the major issues the project faced in the beginning was which digital collections would be eligible for participation in the Tumblr project. The committee discussed the various intellectual property rights asserted over images in the CONTENTdm collections and the permissions that the committee might need to obtain from CARLI institutions to post images from their collections on Tumblr. In addition, Tumblr asserts certain rights over content published on the platform as outlined in its terms of service under the heading "Subscriber Content License to Tumblr."[3] As a result, for the purposes of this trial

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[2] Anderson, Katie Elson (2015). Libraries and Tumblr: A quantitative analysis. *Reference Services Review*, 43(2), -. Retrieved from http://dx.doi.org/doi:10.7282/T3M61N00

[3] Tumblr (2014). Terms of Service. Retrieved from https://www.tumblr.com/policy/en/terms-of-service

period, the committee elected to limit the eligible digital collections to only those contributed by the committee member's own institutions.

Institutions Participating in the Tumblr Pilot Project

- Eastern Illinois University
- Illinois Institute of Technology*
- Illinois State University*
- Lewis University
- Loyola University Chicago*
- Newberry Library
- Southern Illinois University--Carbondale
- Southern Illinois University--Edwardsville
- University of Illinois at Chicago

*Do not have content in CARLI's CONTENTdm Digital Collections

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The second issue the committee faced was how often to post to Tumblr. Consistency in posting frequency can contribute to the success of social media marketing endeavors. Many, if not most, of the libraries, archives, museums, and special collections on Tumblr post at least once a day, Monday-Friday, with some institutions posting multiple times per day. The Created Content Committee decided to aim for posting one image a day, Monday-Friday, to build a consistent schedule.

When the initial working group created their sample posts, they organized their posts around a common theme. For example, Jen Wolfe created a week of cat-themed posts, Margaret Heller posted images of urban streets, and Alice Creason posted images of bridges from the digital collections. The committee decided to stick with this approach when the Tumblr went live. Since the Tumblr project has started, additional themes have included dogs, swimming, botanical images, birthdays, children, and musicians. Individual contributors pick their own themes. They are not decided on by the committee or scheduled in advance.

The working group also created a basic style guide for posting image content from the CARLI Digital Collections on Tumblr which was added to the shared Google doc. Each post consists of a photo which is linked back to its record in CONTENTdm. Through trial and error, the working group also found that the best image quality was produced on Tumblr when the image was downloaded from the CARLI Digital Collections or other participating digital collections site and then uploaded to Tumblr. In addition, the style guide recommended a standard image caption which identifies the title of the image, the name of the contributing institution, and the CARLI Digital Collections or other digital collection site as the source. The caption is followed by a brief, often humorous, description which provides some context for the image, and a link back to the collection homepage from which the image was taken. Finally, all posts

are signed by the contributor, following the practice of the "featured image" posts on the CARLI website.

Contributors also add hashtags before publishing the post on Tumblr. The style guide suggests that each post be tagged with the name of the contributing institution of the image (for example, #lewis university), plus #carli, and #history. Then contributors are encouraged to add any additional hashtags that may be appropriate for their images or theme. Tumblr users can search for content by searching hashtags, so adding relevant tags can help increase discoverability and reach of posts on Tumblr.

Unlike blogging platforms such as Blogger or WordPress, the Tumblr platform has a lively and engaged community of users, and Tumblr includes features that encourage liking and sharing content published on the platform. The committee realized during the planning process that engaging other Tumblr users needed to play a part in the project. When Jen Wolfe created the Tumblr account, she also identified over a hundred other Tumblrs--predominantly other libraries, museums, archives, and special collections--that that the CARLI account could 'follow.' Following another Tumblr means that all of the posts published by that account would appear in a continuous feed on the dashboard of the CARLI Digital Collections Tumblr account.

In addition to the daily post, the contributor checks Tumblr daily for interesting content from the followed blogs to like (which is done in Tumblr by clicking a heart icon to indicate that you enjoyed the content) or reblog (which republishes the content to the CARLI Tumblr). When content is reblogged, Tumblr users have the option to add additional text or comments or the content can be republished as is. Much of this content comes from other libraries or archives, and so is likely to be of interest to our blog followers. This also helps to situate the CARLI Tumblr in the social world of Tumblr and grow our reach.

Seven members of the Created Content Committee volunteered to participate in the Tumblr project by posting regular content. This required the committee to develop a schedule to ensure fair division of labor and consistent content. The committee decided that each contributor would be responsible for an entire week of posts (5 posts, one each Monday-Friday). Alice Creason created a calendar and scheduled each participant's weeks on a rotating schedule through the end of the fiscal year for the pilot project. The calendar was shared with all of the contributors, and contributors were responsible for finding substitutes if they needed to swap a week. Because Tumblr has a feature to schedule posts for future publication, it is possible to do all of the work for the week in one work session, requiring the responsible person only to log in to check for likes and reblogs each day.

In general, the work for the Tumblr each week takes around 2-3 hours to complete. Selecting images for the week and writing captions takes the majority of time, particularly since the committee is limited in the institutions from which it can draw, and is usually unfamiliar with the collections. For people including images from their own institution's collection the time is reduced. The liking and reblogging process only takes a few minutes a day. The Created Content Committee has been able to dedicate enough people to the project so that each person participating only has to cover one week every other

month or so. This is often enough that members do not forget how to use the interface, but not so often that it becomes challenging to complete.

Creating a Group Tumblr: Questions to Consider

- ❏ What will you call the Tumblr? Is the URL available?
- ❏ Who will be responsible for posting content?
- ❏ How often will you post?
- ❏ What types of content will be published on the Tumblr? (images, text, video, etc.)
- ❏ Do you need a style guide for posting content?
- ❏ Do you need any special permissions from your institution to publish your content on Tumblr?
- ❏ How will you engage other Tumblr users?
- ❏ How will you measure success?

LESSONS LEARNED

This project has been an excellent experience for the committee overall, despite challenges and the normal process of becoming familiar with a new platform. Perhaps the most challenging aspect of the project has been the limited number of participating institutions, which makes selecting content more difficult than it otherwise would be. Committee members attempt to select content from a variety of institutions, but ultimately the institutions with larger or more diverse digital collections tend to be selected more frequently. A way to address this would be to invite more CARLI institutions to participate, particularly as guest curators since they would be experts in unique collections at their own institutions.

Another challenge has been figuring out how to set policies as questions arise about Tumblr. Part of this is learning the culture of Tumblr, which is different than other social media platforms in some ways. For instance, what types of blogs should the CARLI Tumblr follow? The committee made a decision to only follow other institutions rather than individuals, but that could change in the future. Other questions have to do with image rights and increasing the number of institutions participating in the project, as mentioned.

The Tumblr platform is relatively straightforward, but there were some issues in learning it, particularly since most of the committee members do not use it regularly. An early technical error was the establishment of the account as "secondary", a category that Tumblr uses for multiple-editor blogs and for those that are password-protected. While experimenting with the platform, we wanted a way to post content without making it live on the internet, so a password-protected secondary Tumblr account seemed appropriate. It was only after we removed the password protection and posted content for several weeks that we discovered an important limitation of secondary Tumblrs: we were unable to interact with other accounts, i.e. following, reblogging or commenting on posts from the rest of the "Tumblrverse" was disabled. Since the primary goal of the project was social media engagement and

outreach, the inability to engage or reach out to others was a deal breaker, so we quickly created a new, primary Tumblr, migrated our existing posts, and continued from there.

Creating links, creating a post in the standard format, and scheduling posts are examples of tasks that committee members may struggle with after not visiting the interface for a long time. Creating a visually appealing theme for the blog has been less of a focus for the committee, but probably needs additional work. Tumblr has an administrative interface that does not use the main blog theme, so it took some time to realize that, for example, the header image for the blog was sized too small and was not displaying effectively to potential followers on Tumblr. Right now the blog theme is very simple, though improving it would be a useful project to undertake in the future.

Screenshot of recent activity from the Tumblr editor's Dashboard

Measuring usage of the site has been another challenge for the committee. As of mid-May, the CARLI Tumblr has posted 197 times total, and has received 121 "notes" (including likes, reblogs, and comments) in the month before that, according to the Tumblr editor's dashboard. The Tumblr has 82 followers, which includes both institutions and individuals. The blog has had a steady growth in followers, indicating that others are finding value in it. The "biggest fans" (as Tumblr calls the blogs which comment or reblog more content) are libraries or special collections units, only one of which is in Illinois. Unfortunately finding older statistics is difficult within the Tumblr dashboard, so the committee

has recently implemented Google Analytics tracking as of May 24, 2016. This will allow the collection of more robust information (including the number of site pageviews, whereas Tumblr only tracks activity such as likes and reblogs) and the long-term retention of usage reports.

The ability to measure return on investment via usage statistics is a crucial advantage held by Tumblr over the Committee's other engagement efforts. While data-driven decision-making is quickly emerging as a best practice in library operations, we continue to post featured images, books, and podcasts to the CARLI website without any feedback on the success of these activities. In order to use resources responsibly -- especially the resource of time put in by Committee members to craft content promoting CARLI digital collections -- we may be better off moving all outreach efforts to Tumblr if the inability to obtain usage statistics from the CARLI blog and podcasts continues.

The Created Content Committee maintains Google Analytics reports for the CARLI CONTENTdm server. The 2016 quarter 3 report (which covers the time since the Tumblr was made public) shows that there were 23 referrals from the CARLI Tumblr to CONTENTdm, meaning that there were 23 clicks from a link in the Tumblr which led someone back to a CARLI collection. There were also 41 referrals from a generic Tumblr URL, some of which may have been the CARLI Tumblr originally. These statistics allow us to track which posts are more likely to draw someone back to learn more about a collection, as well as which posts attracted new users to the CARLI digital collections.
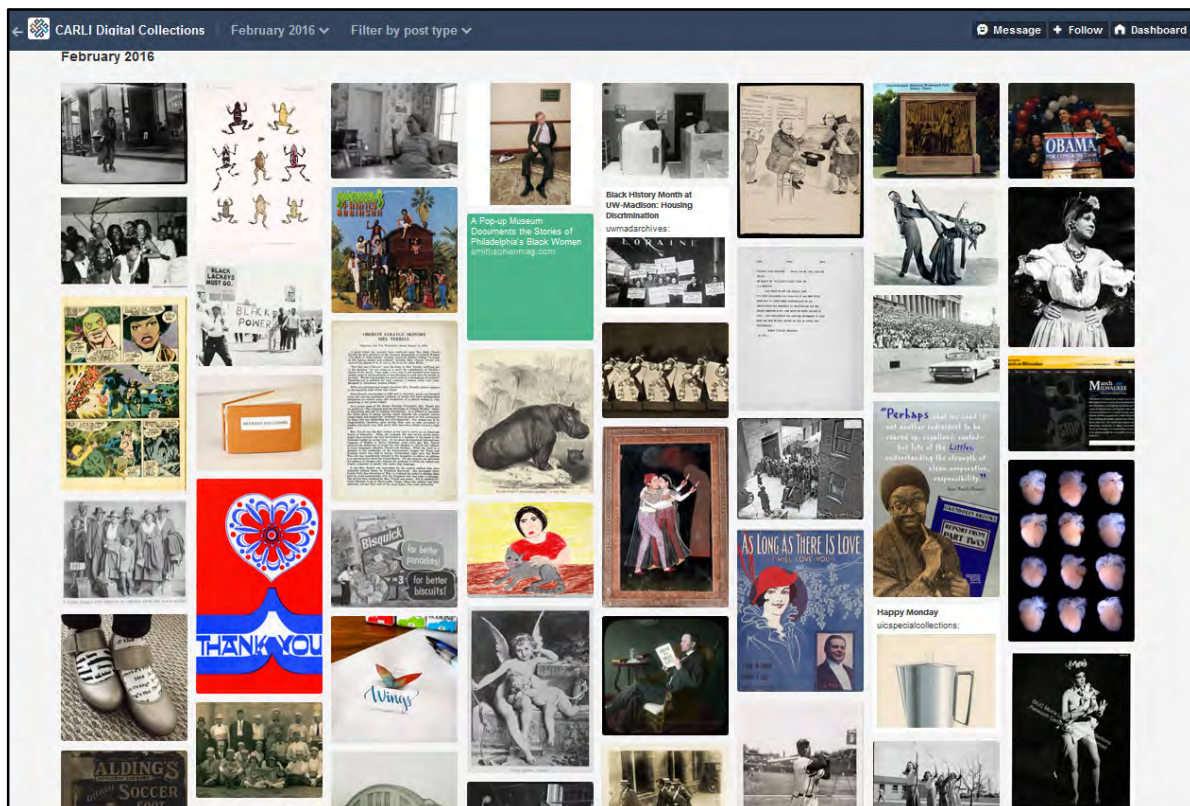
February posts at-a-glance

CONCLUSION & NEXT STEPS

For the people working on the Tumblr project this has been a positive experience, and a pilot project that we feel should graduate to a standard project for the committee. To make that successful, the committee will have to address the challenges identified as well as continue to refine the processes.

The most important next step will be to determine whether and how we can include additional institutions. The committee will work with CARLI governance to address this next fiscal year. An example of an outreach might be a campaign to encourage guest curators from CARLI institutions to contribute posts.

Other steps will be to determine if the current format for posts still works. Weekly topical themes have been a good way to get started, but it will be important to stay fresh and pay attention to what trends are happening on Tumblr and be part of those. Examples might be a day of the week that touches on a certain theme, more than one image per post, or more interaction with followers in posts. A more careful eye to statistics and what types of posts are popular would certainly help with this.

2015–2016 CARLI Instruction Committee:
Annual Report of Activities

Members
Colleen Bannon (2015-2018), Heartland Community College
Frances Brady (2013-2016), Adler University, **Co-Chair**
Larissa Garcia (2015-2018), Northern Illinois University
Michelle Guittar (2013-2016), Northeastern Illinois University
Christina Heady (2015-2018), Southern Illinois University Carbondale
Beth Mandrell (2013-2016), Rend Lake College
Lora Smallman (2014-2017), Southern Illinois University Edwardsville
Chelsea Van Riper (2014-2017), Principia College, **Co-Chair**
Anne Zald (2014-2017), Northwestern University
CARLI Staff Liaisons: Debbie Campbell and Lorna Engels

Charge
The Committee will identify and address issues of critical concern and best practices for instruction librarians and information literacy programs.

Meetings
The first Instruction Committee meeting took place at the CARLI offices in Champaign, Illinois on August 11, 2015 from 10:00-3:00. During that meeting, the committee decided to create subgroups to distribute the workload for the year. This model eliminated the need for monthly phone meetings with the entire committee and enabled the subgroups to accomplish assigned tasks while feeling more engaged. The committee connected in three phone meetings (February 5, April 6, and June 6) to report on the progress with assigned tasks and assess our progress in achieving our annual goals.

Theme
The Committee's theme for this year was "Framing the Big Picture of Library Instruction". This theme was selected to explore ways to implement the new Framework for Information Literacy in Higher Education. Our planned events explored this theme through writing student learning outcomes and curriculum mapping.

Webinar
Deb Gilchrist (ACRL Immersion instruction and VP of Learning and Student Success at Pierce College, Puyallup, WA) presented a webinar on Writing Student Learning Outcomes on December 10 from 1:00 – 2:30. This webinar examined outcomes from several perspectives including philosophy and context of outcomes, strategies and techniques for writing outcomes, as well as assessing outcomes in rubrics across a variety of levels. 54 people registered for the webinar. A recording of this webinar is available and linked from the CARLI website: http://webjunctionillinois.adobeconnect.com/p8eskenia89/

IACRL Pre-Conference Workshop
The Instruction Committee worked with IACRL to provide a workshop as the pre-conference to IACRL, on March 17, 2016 from 9-3:30. The workshop focused on ways that curriculum mapping can be used to strategically align library instructional efforts with students' pathway to degree completion. The morning workshop "Curriculum Mapping to Integrate and Communicate Information Literacy" was led by Anne Zald, Head, Government, Geospatial, Business Information, and Data Services, Northwestern University Libraries. Zald presented definitions of and reasons to create curriculum maps. The majority of the workshop focused on working through the process of creating curriculum maps. The afternoon session

"Information Literacy Leadership and Program Evaluation: Using a Curriculum Map for Program Development" was presented by Lisa Janicke Hinchliffe, Coordinator for Information Literacy Services and Instruction, University of Illinois of Urbana-Champaign. Hinchliffe's session dealt with using leadership skills as instruction librarians and also where curriculum maps fit in the big picture of the role of library instruction in student performance, retention, and/or success, through sharing a logic model. 64 people registered for this event.

Spring Forum–Instruction Showcase
The Instruction Committee will hold its 4th Annual Instruction Showcase on July 20th, at Heartland Community College. The event will offer a day-long forum showcasing innovative elements of library instruction sessions and presentations from instruction librarians at CARLI member libraries. Presenters will demonstrate an instruction session activity that supports skills-based or conceptual learning and encourages active student participation.

This event continues the successful model used for the past three years, with modifications based on last year's participant evaluations. The Showcase will now include round table discussions giving participants an opportunity to engage in a variety of timely topics related to library instruction and information literacy. Additionally, presenters will submit a full lesson plan so that attendees may have clear direction on how to replicate the activity at their own library.

The committee received 13 proposal presentations and will meet on June 6th to determine which proposals to invite for the Instruction Showcase.

CARLI Instruction Committee
Annual Project
2015-2016

Members
Colleen Bannon, 2015-2018, Heartland Community College
Frances Brady, 2013-2016, Adler University, Co-Chair
Larissa Garcia, 2015-2018, Northern Illinois University
Michelle Guittar, 2013-2016, Northeastern Illinois University
Christina Heady, 2015-2018, Southern Illinois University Carbondale
Beth Mandrell, 2013-2016, Rend Lake College
Lora Smallman, 2014-2017, Southern Illinois University Edwardsville
Chelsea Van Riper, 2014-2017, Principia College, Co-Chair
Anne Zald, 2014-2017, Northwestern University

Submitted May 26, 2016

Introduction

This year, the Instruction Committee chose to explore ways to implement the new Framework for Information Literacy for Higher Education. Our theme, "Framing the Big Picture of Library Instruction," was selected to provide a structure that explored how the new Framework impacts library instruction programs. The committee planned and delivered several events to help educate librarians as they began to implement the new Framework at their own institutions.

In the fall, the committee hosted a webinar presented by Deb Gilchrist (ACRL Immersion instructor and VP of Learning and Student Success at Pierce College, Puyallup, WA) on writing learning outcomes. In the spring, the committee organized a workshop on curriculum mapping, with presentations by Anne Zald (Head, Government, Geospatial, Business Information, and Data Services, Northwestern University Libraries) and Lisa Janicke Hinchliffe (Coordinator for Information Literacy Services and Instruction, University of Illinois at Urbana-Champaign).

These events were well received by attendees and influenced the committee's decision to create an annual project that presented an outline and accompanying materials of the year's events to be hosted on CARLI's website, https://www.carli.illinois.edu/products-services/pub-serv/instruction. These resources will provide information for instruction librarians who were unable to attend the events or for those who would like to refer to ideas shared about implementing and assessing the Framework.

- Learning Outcomes: From the Big Picture to the Classroom: https://www.carli.illinois.edu/products-services/pub-serv/instruction/LearningOutcomes-Gilchrist
- Curriculum Mapping: A CARLI-sponsored IACRL Preconference: https://www.carli.illinois.edu/products-services/pub-serv/instruction/CurriculumMapping

Contents

Learning Outcomes: From the Big Picture to the Classroom
Webinar presented by Debra Gilchrist, Pierce College
December 10, 2015

Introduction

We've become accustomed to talking about assessment and assessment of student learning. However, assessment is the measure or test. Let's rather focus on the outcome, on the student, on what we want to see, and what students are learning.

Philosophy of Outcomes Assessment

Outcomes assessment is foundational to our teaching. They help assist in designing our library sessions. Sometimes our carefully planned library sessions are done so from the teacher's perspective. Outcomes and assessment help us look through the student lens. They give us a guide to what we want to teach and set the stage for assessing that outcome. The foundational question when drafting an outcome is "What do you want the student to be able to do?"

Metaphor of the Puzzle
We often look at the products (i.e. bibliography) of student work, but we also need to look at the individual elements that make up that composition. The pieces of the puzzle that comprise the puzzle as a whole. You are encouraged to look at the process students use to get to the final design. Process (that critical thinking element) and product are equally important. For example:
- When students had an opportunity to make a choice about what direction to take with their research, why did they choose resource A instead of resource B?
- What criteria did they use to make that decision to choose that resource?
- How did they decide to stop their search and determine they had sufficient information?

5 Questions to Instructional Design

Questions that will get at the instructional design process and help you take theory into practice. Since outcomes set the stage for design, it is where we need to begin.
1. Outcome: What do you want the student to be able to do?
   - Inspired by the institutional/library mission, values, goals, strategic plans, curriculum or gen ed / information literacy definition / information literacy program goals
2. Content: What does the student need to know to do this well?
   - This is the content or curriculum that you are going to work with. What are you deciding to incorporate to help the student get there?
3. Pedagogy: What's the activity that will enhance the learning?
   - For example, lecture? Hands-on work? What are the things that you are going to do in designing the experience for students?
4. Assignment: How will the student demonstrate the learning?
   - This is the assessment or the assignment. What is the opportunity you are going to give the student so that you can see the learning?
5. Criteria: How will you know the student has done this well?
   - What criteria will you use to determine what is a great answer and what is an answer that doesn't quite get there?

Definitions to Use to Frame Outcomes Assessment Work

- "Assessment is the ongoing process aimed at understanding and improving student learning" – Tom Angelo, AAHE Bulletin, 1996.
- Knowing WHAT you are doing, WHY you are doing it, what students are LEARNING as a result, and CHANGING because of the information -- Deb Gilchrist

Outcomes are the foundation. They are our guides. They are the agreed upon elements of our curriculum.

2 Foundational Rules
1. *Work backwards.* Think about the end product first, the ideal information literate student. What do we want them to be able to do as a result of the teaching? How do we get to that point?
2. *The work is about the student.* This is not about what we teach, but what they will learn.

Checklist for Good Learning Outcomes

- ✓ Measurable or "judgeable"
- ✓ Set the stage for learning that is clear to the student, faculty, and librarian
- ✓ Integrated, Developmental, Transferable
   - ➤ Integrated: Information literacy instruction needs to be integrated within the session, within the course, within the program, within the degree, not something the library owns by itself
   - ➤ Developmental: Asking different things of first year students as opposed to 2nd, 3rd, 4th year or grads students
   - ➤ Transferable: Students understand that it is not something that they are doing just for today or for this course, but for lifelong learning
- ✓ Relates to institutional definitions and documents
   - ➤ Inspired by something that already exists for the institution or the library, i.e. definition of information literacy within the library or for general education
- ✓ Matches the level (course, 50 minute session, program, etc.)
- ✓ Use variety of levels of Bloom Taxonomy
- ✓ "In order to" gets to the uniqueness of the learning – they are "balanced" statements
- ✓ Describes what the students will do

Formula for Writing Outcomes

Verb or Action Phrase   +   IN ORDER TO =   Great Outcomes

- ➤ All outcomes begin with a **verb** or **action phrase** -- an intentional or strong verb
   For example: <u>identifies</u> multiple perspectives; <u>distinguish</u> between general and special databases; <u>analyzes</u> information
- ➤ <u>In order to:</u> the why statement. Sets up a good assessment. Helps you to think about what action you want to see from students.

Examples of outcomes using the formula:
- Brainstorm topic-relevant vocabulary <u>in order to</u> search databases with maximum flexibility and effectiveness.
- Distinguish between general and specialized databases <u>in order to</u> select the best database for the topic and level of specialization.
- Utilize knowledge of the inequalities of information and information power <u>in order to</u> strategically select where to search for sources.

Another example:
- ➢ Develop student learning outcomes
- ➢ Design measureable assessments of student learning

But it is much more powerful to talk about what it is you want students to do and why
- ➢ Develop measurable outcomes, clear criteria, and valid assessment tools in order to impact student learning and improve teaching

Balance the verb and the why statements

Balance the "verb phrase" and the "in order to phrase" to capture the uniqueness of the verb phrase. Or find the <u>unique</u> reason WHY you want the student to DO the verb phrase.

Example of Balancing:
- ➢ Describe criteria for evaluating sources > In order to assess the quality of information
- ➢ Determine bias and perspective > In order to gauge the author's audience, point of view, and what might be missing from the discussion

Writing Outcomes: 5 Things to Remember (or In Order to Pitfalls)

1. Balance the verb and the why statements.
    - ➢ NO: Evaluate websites IN ORDER TO search databases
    - ➢ YES: Evaluate websites IN ORDER TO distinguish quality from unreliable online information
2. Avoid using broad phrases. Be descriptive and focused.
    - ➢ NO: Search periodical databases in order to retrieve good information
    - ➢ YES: Describe criteria for evaluating sources in order to assess the quality of information
3. Avoid multiple verbs. Separate out the outcomes if you have three or more verbs.
    - ➢ NO: Define, identify, and formulate vocabulary in order to conduct successful online searches
4. Transferability: Write outcomes, not just for the class assignment, but for what students will doing beyond the class.
    - ➢ NO: Find 2 scholarly articles in order to write a 10 page paper in psychology
    - ➢ YES: Distinguish between popular and scholarly literature in order to match quality and validity of information to the type of inquiry
5. Avoid "understand." Outcomes go beyond "understanding" to get at what students will be doing. You cannot see understanding.
    - ➢ NO: Understand the increasingly social nature of the information ecosystem where authorities actively connect with one another and sources develop over time (Framework)
    - ➢ YES: Describe the information ecosystem in order to assess how experts collaborate informally and formally to develop a network of information on a subject

Practice Applying the Checklist

For a 100 level Business course, the instructor asks you to emphasize use of scholarly articles.
- ➢ Outcome: Differentiate between popular and scholarly articles in order to use them in the right setting

What's wrong with this outcome?

- o In order to phrase is way too broad, unclear: what does "right" mean?
- o Also, try using a different level of Bloom's Taxonomy. For example:
  - ▪ Students apply their ability to distinguish between the two types of sources
  - ▪ Categorize according to satisfaction of need
  - ▪ Identify the difference between popular and scholarly articles

A 100 level Business course assignment: Research a company you might consider employment with, including size, structure, earnings, philosophy, history, and competition. **Include information that indicates how the company sees itself, and how others (on the outside) perceive the company.**

How would you write the outcome? Examples:
- ➢ Compare impressions of a company to evidence in order to determine acceptability for potential employment
- ➢ Evaluate the perspective/point of view in a given source in order to determine how that viewpoint effects ones' understanding of the topic

Example: All Inclusive Outcome

Introduce the concepts of information literacy to the student population in order that they will improve their ability in writing research papers in all classes which require them, experience greater academic success, will be more likely to persist in completing degrees, will view the library as an environment as helpful in meeting academic needs, and will experience the mission of the College providing education to all who may profit from it.

- ▪ Needs to be broken down into individual concepts

Writing Outcomes in Context

Remember to think about the context for the outcome and at what level you want to write them.

> General Education: Information Literacy & Critical thinking
>> > Library Definition
>>> > Course
>>>> >Instruction Session

Critical Thinking Competency Learning Outcomes Example
Students will:
- ▪ Define the concepts of critical thinking, logic, and argument;
- ▪ Assess the function of clarity in arguments;
- ▪ Compare and contrast the purposes of language in persuasive statements;
- ▪ Evaluate different types of inductive and deductive arguments:
- ▪ Distinguish fallacies from good arguments; and
- ▪ Apply critical reasoning concepts in order to evaluate issues of contemporary importance

Degree Level Example: Pierce College
The information competent student acquires and applies information in order to impact change, inform perspective, make decisions, and frame context.
- ▪ Values inquiry and information needs in order to continually engage in learning
- ▪ Applies a repertoire of creative and flexible information seeking strategies in order to navigate the unfamiliar, take action, or solve a problem.
- ▪ Identifies appropriate sources in order to access relevant information.

- Notice the broad nature of these outcomes that thread through courses and classes – what faculty will turn to when preparing classes

Program Level Example: Criminal Justice, Pierce College
How the department applied the broader degree outcomes (above) to their list of program outcomes.
- Seek, use, and be informed by information to understand and to decrease problems and crime in society and keep current in the field as a professional [Intended Outcome(s)]
- Ability to go beyond one's own opinion and construct an argument with meaningful points on multiple aspects of a topic [Skills & Strategies]

The Content of Outcomes

So many sophisticated to think about and approach information literacy. This is not just about picking a verb, but thinking about the content of what you are trying to frame for students.

For example, three ways in which students could be asked to search for Information:
- Utilize search terms, Boolean operators, and database limiters in order to focus a search
  - Skills
- Utilize citation chaining in order to determine what's missing from a bibliography and develop next steps in a search.
  - Context & connectivity
- Analyze biases in search algorithms in order to seek out information beyond the readily available and determine the power relationships in info availability.
  - Transformative thinking

Another example, for evaluating information:
- Apply the CRAP TEST in order to evaluate information for appropriate use
  - Skills
- Critically read a work in order to evaluate the claims, methods, and strength of evidence
  - Context & connectivity
- Determine the power behind the standards of evidence in order to consider who is heard and not heard in evidence
  - Transformative thinking

Documents from our professional organizations can be used as inspiration for outcomes content
- Information Literacy Competency Standards for Higher Education
- Framework for Information Literacy for Higher Education

Additional Resources/Examples Noted
- Battersby, Mark. "So, What's A Learning Outcome Anyway?" (1999): ERIC. Web. 19 Apr. 2016. http://eric.ed.gov/?id=ED430611

- Rubric for the Analytical of Critical Thinking across the Curriculum, Valencia College. https://valenciacollege.edu/academic-affairs/institutional-effectiveness-planning/institutional-assessment/documents/CriticalThinkingandGEWorktoDate10-9-2014FINALupdated2.pdf

- Ruth Stiehl's work on curriculum design and mapping.

Part I: Curriculum Mapping to Integrate and Communicate Information Literacy
Presented by Anne Zald, Head, Northwestern University Libraries.
http://libguides.northwestern.edu/IACRL2016

What is curriculum mapping?

Definitions of curriculum mapping range from focusing on it as a map or diagram, to a process, to a method of visualizing.

- Charles defines curriculum mapping as a diagram, which shows how disparate pieces of information relate to each other: "…a diagrammatic representation of the curriculum displaying the different elements of the curriculum and the interrelationships between these different elements." (Charles, L.H. 2015. Using an informational literacy curriculum map as a means of communication and accountability for stakeholders in higher education. *Journal of Information Literacy*, 9(1):47-61. http://dx.doi.org/10.11645/9.1.1959)

- Buchanan defines curriculum mapping as an action: "… a process for evaluating the various components of a curriculum for cohesiveness, proper sequencing, and goal achievement." (Buchanan, H., Webb, K.K., Houk, A.H., & Tingelstad, C. 2015. Curriculum mapping in academic libraries. *New Review of Academic Librarianship*, 21: 94-111. DOI: 10.1080/13614533.2014.1001413)

- Booth & Matthews define curriculum mapping from a user-centered view of learning: "Curriculum mapping is a method of visualizing insight into the steps, requirements, and communities a learner negotiates as they engage with a particular learning experience or degree path." (Booth, C. & Matthews, B. 2012. Understanding the learner experience: threshold concepts & curriculum mapping. Invited paper presented at the California Academic & Research Libraries Conference, April 7, 2012, San Diego, California.)

Why do curriculum mapping?

Before creating a curriculum map, it is important that those involved understand the purposes of the map. Curriculum mapping is not an end itself.

- One purpose for curriculum mapping is to map library instruction to larger institutional or departmental learning outcomes.
  - ➢ This allows for strategic alignment of information literacy learning with discipline-specific and general education curricula. Integrating information literacy into the curriculum allows students to receive cumulative, scaffolded experiences, rather than simply an isolated one-shot class. The curriculum map can be used in talking with faculty to explain the need for a developmental approach to information literacy learning. It can also serve as the framework for assessing the library instructional program, which in turn demonstrates the value of library instruction to the institution.

- Another purpose of curriculum mapping is to focus on the student experience.
  - Looking at the pathways to degree completion might show areas outside of classes (e.g. thesis or capstone), where information literacy is needed. Additionally, it integrates curricular and co-curricular learning, as much of what students learn happens outside the classroom. Even within classes, curriculum mapping reveals patterns, such as where there are gaps in student learning, versus where there are redundancies. These patterns can show both where library interventions currently are, and also where they should be in the future.

- A third purpose of curriculum mapping is to create a curriculum content analysis.
  - A syllabus study can provide a snapshot view of exams, types of assignments, how assignments are communicated to students, methods used for analysis, etc. This analysis can also provide information for collection development, in that it can allow librarians to identify strategic priorities for collections that may have otherwise not been obvious.

How to create a curriculum map

1. Determine the type of map
There is no set format for a curriculum map. One method is a concept map or spider style, which depicts a holistic view of the student experience. By charting disparate pieces of information, it can show commonalities and differences between different departments. Others take a more organic approach, thinking of curriculum mapping as a conversation. Most of the worksheets provided at this workshop were in the matrix style, such as mapping classes to outcomes. For more information and examples, please see Zald's LibGuide.

Materials needed (at a minimum - additional, local information sources may be useful)
- ✓ National standards, disciplinary standards, framework
- ✓ Accreditation standards
- ✓ Institutional learning outcomes
- ✓ Assessment office reports/tools
- ✓ Program documentation
  - Course sequences
  - Large enrollment
  - "Gateway" courses
  - Learning outcomes
- ✓ Courses
  - Syllabus
  - Outcomes
  - Assignments
  - Assessments

2. Map out the process

An example was provided for creating five matrix maps, each of which builds on the previous maps. For blank worksheets (as described below), see Zald's LibGuide.

a. Mapping outcomes
   ➢ Where: See Worksheet 1: Outcome Mapping
   ➢ What: Map library outcomes to institutional, and institutional to professional/national outcomes.
   ➢ How: First, gather pertinent documentation. Also consider at what level of sophistication the library is meeting each outcome (e.g. **I**ntroduce/**R**einforce/**E**nhance). This progression can also be shown within the map. This map is looking at the picture with a wide-angle lens.

b. Course View
   ➢ Where: See Worksheet 2: Course View
   ➢ What: At a more granular level, look at a specific course. Map the learning outcomes for the library instruction to the university's learning outcomes.
   ➢ How: For each learning outcome, list informal and formal assessments for library instruction, as well as the teaching strategy used.

c. Current Program
   ➢ Where: See Worksheet 3: Current Program
   ➢ What: Look across multiple courses to show where there are gaps, duplication, lack of increasing sophistication over courses, quantity of "touches", and any lack of strategy. Maps current program
   ➢ How: Using the first two maps, this map includes multiple courses, and aims to look across them for what method of library instruction is used (e.g. **T**utorial, **L**ibguide, **C**lassroom, **P**artnership with program coordinator), which learning outcome is covered, and to what level of sophistication (**I**ntroduce/**R**einforce/**E**nhance).

d. Strategic Courses
   ➢ Where: See Worksheet 4: Strategic Courses
   ➢ What: Show which courses are strategic to reach
   ➢ How: In deciding whether a course is strategic, consider the following:
      ▪ What courses are prerequisites?
      ▪ What courses do all students in a degree program have to take?
      ▪ What courses would be excluded from mapping (e.g. independent study, etc.)?
      ▪ Are there special student characteristics to keep in mind (e.g. large number of transfers, international students, a high need for remediation)?

e. Proposed Program
   ➢ Where: Worksheet 5
   ➢ What: Maps a proposed program. Shell is identical to current program map of worksheet 3
   ➢ How: Having seen where the gaps/redundancies lie and decided on which courses are strategic, this map can be created.

3. Planning
   ▪ Consider who needs to be involved at which steps.

- Decide the scope of the curriculum map (e.g. particular division, specific department, general education courses, etc.)

Example: Incorporating the ACRL Framework for Information Literacy in Higher Education

Using the University of Minnesota as an example, Zald defined a few sample outcomes for students when they have completed a bachelor's degree.

For example, at the time of receiving a bachelor's degree, students:
1. Can identify, define, and solve problems
2. Can locate and critically evaluate information
3. Have mastered a body of knowledge and a mode of inquiry

These outcomes can be defined based on an institution's baccalaureate or other institutional student learning goals. The next step would be to map these institutional goals to the information literacy definitions, standards, and frames (or knowledge practices and/or dispositions) provided by ACRL.

Incorporating the Framework

Mapping student learning goals to the Framework proved somewhat challenging, but not impossible. The Framework supports the teaching of the concepts that comprise information literacy, and for that reason, many of the knowledge practices and dispositions within frames could be applied to each student outcome.

For example, working with just one frame, "Research as Inquiry," and applying it to the outcomes listed above:

1. Students can identify, define, and solve problems.
   - Corresponding frame: Research as Inquiry.
   - Corresponding knowledge practice(s): Learners formulate questions for research, determine an appropriate scope of investigation, deal with complex research by breaking complex questions into simple ones, use various research methods, organize information in meaningful ways, synthesize ideas from multiple sources, and draw reasonable conclusions based on the analysis and interpretation of information (Research as Inquiry Knowledge Practices 1-8).
   - Corresponding disposition(s): Learners consider research as open-ended exploration and engagement with information, value persistence, adaptability, and flexibility and recognize that ambiguity can benefit the research process, seek multiple perspectives, and seek appropriate help. (Research as Inquiry Dispositions

Using this one example, it's easy to see how mapping a curriculum map to the Framework can be a complicated process due to its conceptual nature. However, doing so does also allow you to become more familiar with the concepts you do and/or should be teaching to achieve your institution's student learning goals. You can do this same approach with the ACRL Standards for Information Literacy.

Part II: Information Literacy Leadership and Program Evaluation: Using a Curriculum Map for Program Development
Lisa Janicke Hinchliffe, University of Illinois at Urbana-Champaign

After Creating a Curriculum Map, What Do You Use It For?

Hinchliffe led a curriculum mapping project at the University of Illinois at Urbana-Champaign, and used the project as a jumping off point for advocacy for the library's instruction program. Advocacy includes developing leadership proficiencies among instruction librarians, and using a logic model to articulate the intended results of the library instruction program.

- All Hinchliffe's handouts are available through the University of Illinois at Urbana-Champaign institutional repository: https://www.ideals.illinois.edu/handle/2142/89697.

Regarding developing leadership proficiencies, Hinchliffe distributed a handout on the Standards for Proficiencies for Instruction Librarians and Coordinators, from the Association of College and Research Libraries (http://www.ala.org/acrl/standards/profstandards), focusing on category number seven, Leadership Skills. These Proficiencies state:

> The effective instruction librarian:
>
> 7.1. Demonstrates initiative by actively seeking out instruction opportunities or instruction committee work within the library, at the institution, and in regional or national organizations.
>
> 7.2. Encourages librarians and classroom faculty to participate in discussions, ask questions, and to share ideas regarding instruction.
>
> The effective coordinator of instruction:
>
> 7.3. Mentors librarians and provides constructive feedback to improve instruction.
>
> 7.4. Works effectively with the head of the library and other supervisors to promote and develop library instruction on campus.
>
> 7.5. Seeks leadership roles within the library and institution that promote library instruction initiatives.
>
> 7.6. Advocates for improving instructional services through support for training or improving skills of instruction librarians, better facilities, increased emphasis on library instruction by library administration, and dedication of resources to these areas.

She asked participants to consider their strengths, areas in which they may improve, and key people who might help them improve.

Using a Logic Model
Logic models link Planned Work including Resources/Inputs and Program Activities to Intended Results including Outputs, Outcomes, and Impact. See links below to Hinchliffe's handouts for a definition and visual representation of the logic model. Below are excerpts from the Logic Model Basics handout provided by Hinchliffe.

> Your Planned Work:
> ➢ Resources/Inputs include human, financial, organizational, and community resources a program has available to direct toward doing work. Leadership proficiencies of instruction librarians are included as resources or inputs in planned work for a library instruction program, as are instructional spaces, software programs, training or professional development for librarians, and curriculum maps.

➢ Program Activities are what a program does with its resources. This includes classes taught, faculty outreach, outreach to programs, course coordinators, advisors, or learning support, assignment design, changes made to curriculum maps, and student learning assessment.

Your Intended Results:

➢ Outputs are the direct products of program activities. Outputs of a library instruction program can include statistics on student learning, library instruction services embedded in curriculum, number of instruction sessions, how often spaces are used, and how often librarians are consulted. In assessment, this includes asking the question: Did library instruction deliver what was anticipated? And, was it high quality?

➢ Outcomes are the specific changes in program participants' behavior, knowledge, skills, status, and level of functioning. Short-term outcomes should be attainable within 1 to 3 years, while longer-term outcomes should be achievable within a 4 to 6 year timeframe. This includes answering the question: Did students learn? Is library instruction successful in supporting students to achieve departmental or institutional student learning outcomes for information literacy?

➢ Impact is the fundamental intended or unintended change occurring in organizations (i.e., universities) as a result of program activities within 7 to 10 years. For a library instruction program, this requires linking student performance, retention, and/or success to library instruction.

The logic model provides a roadmap for planning, assessing, and advocating for a library instruction program; a curriculum map and instruction librarian proficiencies are just two of the resources that go into the success of such a program.

Members
Patrick Brown (2015-2016), Southern Illinois University Carbondale
Mary Burns (2015-2016), Northern Illinois University
Miriam Centeno (2014-2016), University of Illinois at Urbana-Champaign, **Co-chair**
Jenny Dunbar (2014-2017), College of DuPage
Gregory MacAyeal (2014-2017), Northwestern University
Beth McGowan (2013-2017), Northern Illinois University, **Co-chair**
Jamie Nelson (2015-2018), DePaul University
Melanie Schoenborn (2015-2018), Southern Illinois University Edwardsville
Anne Thomason (2014-2017), Lake Forest College
CARLI Staff Liaisons: Elizabeth Clarage and Nicole Swanson

Meetings
 The Preservation Committee met twelve times during FY 2016:
- Two in-person meetings at the CARLI Office
- Eight conference calls

The first major topic discussed at these meetings included first the planning and post mortems of three events: the Illinois Fire Service Institute (IFSI) Burn Simulation and Recovery Workshop of Summer 2015, the Chicago Open House event at the University of Chicago and the Center for Research Libraries held in Fall 2015, and the University of Illinois at Urbana-Champaign Audiovisual Preservation Workshop for Spring 2016. The second major topic of discussion was the selection of a topic for our Annual Project and the work to accomplish its goals.

Activities
- Developed the year-long project to address AV preservation, one of the needs made evident in the 'Preservation Survey' that the Committee completed as its 2014-2015 Annual Project.
- Maintained and updated the Preservation Resources webpage:
  http://www.carli.illinois.edu/products-services/collections-management/preservation-resources
- Contributed the following CARLI Newsletter Preservation Tips:
  o 2015 Burn Simulation and Recovery Workshop Revisited by Greg MacAyeal, Northwestern University
  o From Cassette to Could: Reformatting Audiotape Webinar Recording Available shared by Miriam Centeno, University of Illinois at Urbana-Champaign
  o A Year in the Life of Audiovisual/Media Preservation in Illinois: Introduction by Miriam Centeno, University of Illinois at Urbana-Champaign
  o A Year in the Life of Audiovisual/Media Preservation in Illinois: Inventory of Video by Melanie Schoenborn of Southern Illinois University Edwardsville
  o A Year in the Life of Audiovisual/Media Preservation in Illinois: Film Identification, Film Condition and Film Preservation, by Beth McGowan, PhD, Northern Illinois University
  o A Year in the Life of Audiovisual/Media Preservation in Illinois: Collection Assessment by Miriam Centeno, University of Illinois at Urbana-Champaign

- o A Year in the Life of Audiovisual/Media Preservation in Illinois: Audio by Greg MacAyeal, Northwestern University
- o A Year in the Life of Audiovisual/Media Preservation in Illinois: New Prints & Digitization, Mary Burns, Northern Illinois University
- o A Year in the Life of Audiovisual/Media Preservation in Illinois: Disaster Planning by Jamie Nelson, DePaul University
- o A Year in the Life of Audiovisual/Media Preservation in Illinois: **Fr**om Cassette to Cloud: Reformatting Audiotape Webinar Recording Available by Miriam Centeno, University Of Illinois At Urbana-Champaign
- o A Year in the Life of Audiovisual/Media Preservation in Illinois: Care & Handling by Miriam Centeno, University of Illinois at Urbana-Champaign
- o A Year in the Life of Audiovisual/Media Preservation in Illinois: Grant Writing by Melanie Schoenborn of Southern Illinois University Edwardsville and Joseph "Joe" Feigl III, Graduate Student at University of Illinois at Urbana-Champaign
- o A Year in the Life of Audiovisual/Media Preservation in Illinois: Still Photographs by Jenny Dunbar, College of DuPage
- Transformed these Preservation Tips with additional materials into a web page for Audiovisual / Media Preservation.
- Sponsored the Illinois Fire Service Institute Burn Simulation and Recovery Workshop on July 16th for thirty-one participants. This program was full.
- Sponsored the Chicago Preservation Open House at the University of Chicago and the Center for Research Libraries. Fifty participants from CARLI member institutions attended this program on October 23, 2015. This program was full.
- Sponsored the Audiovisual Preservation Workshop at the University of Illinois at Urbana Champaign, April 18, 2016. This program was full with 35 registrants and two more who remained on the waiting list.

Future Plans

The committee will continue to contribute Preservation Tips to the CARLI newsletter and maintaining the Preservation Resources Webliography on the CARLI website.

Information gathered through the 2015 Preservation Survey gave the committee a wide variety of project possibilities for 2016. We believe another project might be followed in 2016-2017 using the information gathered from that same Survey. The success of the Preservation Open House suggests that additional Open Houses may be conducted next fall. The committee is also planning a spring Collection Care workshop at Illinois State University is also being considered. The year-long project that focused the year's writing and programming activities was considered successful and is offered to the Committee as a model for future work.

Preservation Committee 2015-2016 Annual Project
A Year in the Life: AV/Media Preservation in Illinois

https://www.carli.illinois.edu/products-services/collections-management/year-life-audiovisual

A Year in the Life: AV/Media Preservation in Illinois

Introduction

Inventories/appraisal

→ VIDEO

→ FILM

→ STILL IMAGE

→ AUDIO

Assessment

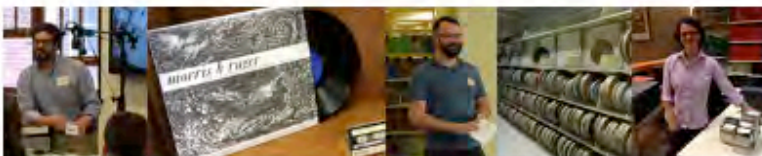## Care & Storage

Reformatting

Disaster Planning

Grants

Reflections on Our Year

PATRICK BROWN'S STORY OF HIS YEAR

ANNE THOMASON'S STORY OF HER YEAR

PRESERVATION COMMITTEE'S REFLECTIONS OF OUR YEAR

Resources

SYSTEM STATUS

● All Systems Active: All Services are Online

LATEST NEWS / ALL NEWS »

Minutes, November 1858–January 1875 -- CARLI Digital Collections Featured Image
May 31, 2016

Birthday Cake at the Pioneer Supper - CARLI Digital Collections Featured Image
May 13, 2016

Women with bicycles, circa 1890s – CARLI Digital Collections Featured Image
May 4, 2016

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A Year in the Life: AV/Media Preservation in Illinois – Sample – *Film*

https://www.carli.illinois.edu/year-life-audiovisual/media-preservation-illinois-film-identification-film-condition-and-film

materials.Film, specifically moving pictures, cut sheet film, microform/microfiche, or amateur film, comes in three materials that correspond to roughly three major periods. From 1890 to mid-1920s, all film was nitrate film. Following the mid 1920's came a period of 30 years when nitrate film co-existed with triacetate film. The triacetate film (often labelled safety film) was created to combat the flammable nature of nitrate film. Acetate is less flammable, but though thought to be more stable for preservation purposes than nitrate, it shares many of nitrate's durability issues. Nitrate film finally disappeared from production in all types of film in 1951. Between acetate's development and the mid-1950s, acetate's durability issues became clear, and a third material, polyester film, was introduced in cut sheet film, amateur film, and microfilm. While acetate continued to be used for many years in motion pictures because it was easier to splice than polyester, by the early 1980s it ceased to be used in other formats such as microfilm. Acetate and polyester both continue to be produced, though polyester truly is more durable. Therefore, for most organizations, acetate film needs most attention in terms of preservation.

	Movies	Cut sheet Film	Microform/Fiche	Amateur Film
NITRATE: TIME AND LABELLING	Labelled Nitrate	Labelled Nitrate	Labelled Nitrate	Labelled Nitrate
	All 35mm 1890-1951	All 1890-1920	Earliest Microfiche – 1920's to 1930's Nitrate Very rare	All between 1890-1940s
		Some 1920 – 1940; rare after 1940		Some between 1940-1950: no nitrate after 1950
Deterioration	Image fading	Image fading	Image fading	Image fading
	Sticky emulsion & faintly smelly	Sticky emulsion & faintly smelly	Sticky emulsion & faintly smelly	Sticky emulsion & faintly smelly
	Bubbling & stronger smell	Bubbling & stronger smell	Bubbling & stronger smell	Bubbling & stronger smell
	Film congealed in a mass—very smelly	Film congealed in a mass—very smelly	Film congealed in a mass—very smelly	Film congealed in a mass—very smelly
	Film is brown powder	Film is brown powder	Film is brown powder	Film is brown powder

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ACETATE: TIME AND LABELLING	If labelled Safety Film: before 1955: Acetate	Labelled Safety Film Before 1955: Acetate	Labelled Safety Film Before 1955: Acetate	Labelled Safety Film Before 1955: Acetate
	35mm 1951-present (polyester more possible after 1980)	Introduced in 1920, popular in late 1930s Almost all after 1940 EXCEPT pack-films, common in nitrate until 1949	Majority of film 1930s to 1980s Acetate	Acetate after 1950 even today
	16mm home film, probably acetate from 1920-today	Some color transparency still acetate today		
POLYESTER TIME AND LABELLING	Labelled Safety Film: After 1955	Labelled Safety Film	Labelled Safety Film	Labelled Safety Film
	Trials begin in early 1950s	Used in Xrays in 1950s, graphic arts	Nearly all today	
	1980s-present	Replaces acetate in 1960s and 1970s		

Physical Characteristics and Physical Condition of Film

Beyond identification by the date material was created, another way to identify a type of film is to examine its physical properties. Nitrate and acetate film share basic construction characteristics: they have several layers and the integrity of these layers are central to the condition of the film. (For more information on the layers of film and their roles in film, (See "⬛ Film Preservation for an Academic Collection" CARLI Workshop October 13, 2008.) This makes them similar in some significant physical ways that differentiate them from polyester film. They are both easy to tear (and consequently to splice) while polyester is hard to cut or to tear and therefore to splice. Both nitrate and acetate are dense, not translucent in reels while polyester film allows light to pass through it. Polyester film, when placed between polarizing sheets of plastic, reveals birefringence while neither nitrate nor acetate does.

In addition, film deterioration also provides a means to identify film. As most of the film that needs preservation in most collections is acetate, acetate deterioration needs to be identified. These are its major characteristics: a vinegary odor caused by the actual creation of vinegar as the film decomposes, brittleness, shrinking, bubbling on film surface, and a pink or blue coloration. (For a full explanation of the chemical processes involved, see James M. Reilly, "Basic Strategy for Acetate Film Preservation" in *Microfilm & Imaging Review* September 2002 117-13) In addition to using the senses to identify deterioration in acetate film, there are products, notably acid detector strips inserted into the film enclosure, that test the condition of film by testing its acidity. Consultants may also be hired to monitor the condition of film collections.

https://www.carli.illinois.edu/year-life-audiovisual/media-preservation-illinois-film-identification-film-condition-and-film

	Movies	Cut sheet Film	Microform/Fiche	Amateur Film
NITRATE: PHYSICAL ATTRIBUTES	Easy to tear	Easy to tear	Easy to tear	Easy to tear
	Light does not pipe through	Light does not pipe through	Light does not pipe through	Light does not pipe through
	No birefringence	No birefringence	No birefringence	No birefringence
ACETATE: PHYSICAL ATTRIBUTES	Easy to tear (splices easily)	Easy to tear (splices easily)	Easy to tear (splices easily)	Easy to tear (splices easily)
	Light does not pipe through	Light does not pipe through	Light does not pipe through	Light does not pipe through
	No birefringence	No birefringence	No birefringence	No birefringence
Deterioration	Vinegar Smell	Vinegar Smell	Vinegar Smell	Vinegar Smell
	Brittleness, easily shattered	Brittleness, easily shattered	Brittleness, easily shattered	Brittleness, easily shattered
	Shrinks	Shrinks	Shrinks	Shrinks
	Bubbles	Bubbles	Bubbles	Bubbles
	Blue or Pink Coloration	Blue or Pink Coloration	Blue or Pink Coloration	Blue or Pink Coloration
POLYESTER: PHYSICAL ATTRIBUTES	Hard to tear: hard to splice	Hard to tear: hard to splice	Hard to tear: hard to splice	Hard to tear: hard to splice
	More translucent	More translucent	More translucent	More translucent
	Birefringence	Birefringence	Birefringence	Birefringence

To do determine birefringence: Place film between two layers of polarized plastic sheeting. If then viewed through transmitted light, colors like "oil slicks on ponds" will appear. (Reilly, IPI, 21)

Preservation

The physical condition of film, whether nitrate or acetate, dictates preservation needs. If a film has already begun to chemically deteriorate, it should not be stored at room temperature. Once the deterioration process begins, it feeds further decay. Generally, the optimal preservation strategy requires colder and drier conditions. While there is no ideal temperature, colder is better. Relative humidity is best kept between 20% and 50 % humidity with the lower end of the spectrum (20-30 %) being dramatically better for long term storage as a low relative humidity also keeps pollutant levels low. Finally, enclosures should be chemically inert. How individual institutions create these conditions depend upon resources. Some use microclimates; some attempt more macro fixes.

In any case, a great deal of very practical and precise research has been conducted on the optimal conditions for varying degrees of deterioration. For precise measurements of speed and progress of deterioration already begun and best storage practices, see the "IPI Storage Guide to Acetate Film" written by James M. Reilly. Accompanying Reilly's guide is a very handy set of tables and a wheel to determine storage needs of acetate film based on present conditions. It should be clearly understood that no storage methods can restore film, it can only retard further damage. This guide can more or less double as a guide on the preservation of nitrate films as well.

CASE STUDY

Throughout the year, Anne Thomason from the Donnelley and Lee Library at Lake Forest College and Patrick Brown from Morris Library at Southern Illinois University will be sharing their experiences with audiovisual preservation. Below are questions regarding motion picture film, cut sheet film, microfilm, either microform or microfiche, and amateur film.

Question	Anne Thomason from Donnelley and Lee Library, Lake Forest College	Patrick Brown from Morris Library, Southern Illinois University Carbondale
How/where are the above types of film stored in your collection? Are they stored together or throughout	We are currently in the middle of an inventory of AV materials. I don't think we have any motion picture film. We do have quite a few slides and negatives primarily in our railroad photography collections. They are not stored separately from other materials; they are kept in the same low humidity/cold temperature collections as other items. We don't have another place to store them.	We have motion picture film and still image negatives in Special Collections and Archives. In General Collections, Special Collections, and Records Management we have microfilm. Motion picture film and negatives are kept in SCRC's closed stacks and are distributed among their different collections with the exception of our nitrate film, which is in a freezer in offsite storage. Our General Collections Microfilm (which includes Gov Docs,

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your general collection?	We also have microfilm scattered throughout the collection. Most microfilm is part of the general library collection and thus not stored in any climate controlled area.	Newspapers, and other Periodicals) is in a dedicated space on one floor of our open stacks. Records Management's microfilm is in a dedicated room in offsite storage.
Do you know what kind of film each of your items was produced in, i.e., nitrate, acetate or polyester?	I do not know.	Yes. We did the AVsap survey a few years ago. The nitrate film was identified. Our SCRC staff is trained to look out for nitrate film. While I was here, they found some nitrate still negatives while processing a new collection. Luckily the collection had positives of the same images as well as glass plate negatives, so we didn't need to keep the nitrate film. We were able to work with our University's Center for Environmental Health and Safety to safely dispose of the film.
Do you have means to assess the condition of the film?	I think this will be a later step for us depending on how much motion picture film we have, for one. I have not noticed any vinegary smells.	This is an area I need to learn more about.
How valuable are these elements of your collection? Which need long term storage?	The railroad photographs are very important to our collections and need long term storage. Any microfilm likely will not be digitized at this point, but also generally I don't think the microfilm is of valuable materials (that might change as the inventory continues...)	Most of our film collections are highly valuable. We have legal obligations for some of the materials.
How important is it to maintain the original in your collection? Which can be copied digitally?	For the slides/negatives, very important. We also are producing digital copies of many of the railroad photographs.	Very important. While we primarily provide access through digital surrogates for motion picture film, we do try to keep the originals.

A Year in the Life: AV/Media Preservation in Illinois – Sample – *Film*

Resources

WORKS CONSULTED

Bigourdan, Jean-Louis and James M. Reilly. ⬈ "Effectiveness of storage conditions in controlling the vinegar syndrome: preservation strategies for acetate base motion-picture film collections."

Forbes, David. "Film Archives: A Decaying Visual History" in *African Research and Documentation* 110 (August 2009): 37-43. *Library Literature and Information Science.* Web. 13 May 2016.

Frick, Caroline. "Separate but Equal? Bolstering Audiovisual Preservation" *Preservation, digital technology & Culture* 43.1/2 (April 2014): 20-25. Print.

Reilly, James M. "Basic Strategy for Acetate Film Preservation" *Microform & Imaging Review* 31.4 (September 2002): 117-130. Print.

Reilly, James M. ⬈ *IPI Storage Guide for Acetate Film* Rochester, NY: Image Permanence Institute, 1993.

ADDITIONAL ONLINE RESOURCES

Dean, John F. ⬈ *Cornell Library Conservation and Preservation Tutorial*. Ithaca, NY: Cornell University Library December 15, 2004.

⬈ *Film Preservation Guide: The Basics for Archives, Libraries, and Museums*. National Film Preservation Foundation 2004.

⬈ *Image Permanence Institute*. Rochester, NY: Rochester Institute of Technology 2016.

⬈ *National Film Preservation Foundation*.

⬈ *Northeast Document Conservation Center (NEDCC)*.

→ *Continue to the next article: Still Image*

→ *Return to AV/Media Preservation*

Please view the full *A Year in the Life: AV/Media Preservation in Illinois* project at:

Members
Rebecca Brown (2013-2016), College of DuPage
Raeann Dossett (2014-2017), Parkland College
Anne-Marie Eggleston Green (2015-2018), Kishwaukee College
Susan Franzen (2015-2018), Illinois State University
Paula Garrett (2013-2016), Illinois Math and Science Academy
Jennifer Sauzer (2013-2016), Columbia College Chicago, **Co-Chair**
Cory Stevens (2015-2018), Lake Forest College
Richard Stokes (2014-2017), University of Illinois at Urbana-Champaign
Julia Venetis (2014-2017), Elmhurst College, **Co-Chair**
CARLI Staff Liaisons: Elizabeth Clarage and Denise Green

Meetings
One in-person meeting, hosted by Columbia College Chicago, and 10 conference calls.

Activities
- **Open House**:
  Hosted by College of DuPage and Wheaton College: March 3, 2016. 24 registrants.
  Presentation on Media Scheduler, a Voyager Product, by College of DuPage staff.
  Presentation on Open Room, a room scheduling program by Wheaton College staff.
  The day included library tours and discussions on the different products.

- **Open House**:
  Hosted by Illinois State University (ISU) & Heartland Community College (HCC): March 11,
      2016. 30 registrants.
  - o Presentation on Piktochart by Jennifer Sharkey of ISU.
  - o Presentation on Poll Everywhere by Alexis Wolstein of ISU.
  - o Presentation on Wideo by Chris Worland of ISU.
  - o Presentation on Kahoot, Shelflister, and Cluster by Colleen Bannon and Colleen Shaw of
    HCC. The day included a self-guided tour of ISU, a tour and Q&A session at HCC.|

- **Open House**:
  Hosted by Columbia College Chicago: April 1, 2016. 34 registrants. This program was full.
  - o Presentation on Tableau by Jennifer Sauzer of Columbia College Chicago.
  - o Presentation on Asana by Dominic Rossetti and Emily Speryl of Columbia College
    Chicago. The day included a tour of both the library at Columbia College as well as the
    Archives and a preview of their new Maker Lab.

- **Annual Project**: Productivity Tools Website: a matrix of free or low cost tools to assist librarians
  and library staff in increasing their productivity in various areas.
  - o https://www.carli.illinois.edu/products-services/pub-serv/2016-productivity-tools-list

Future Planning:
- We hope to continue growing the Tools Matrix based on feedback and additions from all CARLI
  members, in addition to other ideas from new committee members.

Productivity Tools List: 2016 Public Services Committee

The CARLI Public Services Committee's presents our Productivity Tools List of software and productivity apps that may be useful for CARLI libraries. Some of the tools have been highlighted this year in our three onsite Open Houses, other tools have been suggested by the committee's members or by Open House participants. Our goal is to provide experience-based information rather than formal reviews. We hope you'll find the Toolbox helpful to you in managing projects, people, and social media.

Tool	Type	Cost	Mobile version/features	Max number of users	Platform compatibility
Asana (https://asana.com/)	Project Management	Free for teams up to 15 people. $8.33/person for Premium version.		15 for Free version.	Internet based product
Voyager Media Scheduler (http://www.lib.umt.edu/files/media_sched.pdf)	Room and Resource Scheduling	part of I-Share membership			
Kahoot (https://getkahoot.com/)	Instruction/Game Based Learning Platform	Free	Currently prototype app for Android in Google Play Store; No iOS app at this time; Kahoot works on all mobile devises through web browser	Up to 1,000 users can play a game at one time, but dependent on bandwith,etc. http://tinyurl.com/j6aag7v	Internet-based product
Shelflister (http://rocky.uta.edu/doran/shelflister/)	Voyager Client for Shelf Lists; Use for shelf reading & collection development	Free	Designed for mobile devices: 3.0 for tablets, 2.0 for smartphones	No max number	Shelflister is server-based, so it is platform independent
Cluster (https://cluster.co/)	Photo Sharing	Free	App for iOS & Android	No limit to group size	Internet-based product
Piktochart (https://piktochart.com/)	Data Visualization	Free basic account; $15 for added 100mb upload; $29 for 400mb & more privacy options; Pricing for non-profits &	Optimized for iPad only	Accounts are for single user except when non-profit or educator account product purchased.	Internet-based product

Tool	Category	Pricing	Mobile	Max number	Platform
Wideo (http://wideo.co/en/)	Video Creation	educators $39.99 Free for 30 second wideos; $19 per month for 180 second wideos; $39 for unlimited length	iPhone and iPod app video templates are available.	No max number	Internet-based product
Poll Everywhere (https://www.polleverywhere.com/)	Instruction	$0 Free; $19 Basic; $79 Presentation; $199 Convention; $499 Summit; $1,999 Custom; Also Offers Higher Ed Plans: $0 Free; $14 per year per student; $349 per instructor for semester;	Designed to work on mobile devices (i.e. phones, tablets)	Free - 25; Basic - 50; Presentation - 100; Convention - 200; Summit - 500; Custom - 500+	Internet-based product; Compatible with PCs and Macs
Tableau (http://get.tableau.com/) (Note 1)	Statistical Analysis	Server $10,000 Professional $1,999 Personal $999 Online $500 annually per person Public FREE	Free Mobile App is avalible for Android and I-Phone to view Tableau data	Server is a 10 user licence; All other options are single user	Windows; OSX; Public and Onliner versions are Internet based
OneNote (http://onenote.com) (Note 3)	Knowledge/Note Binder cross platform	FREE for all platforms	Free Mobile App for Android, I-Phone, and Windows Phone and Tablets	unlimited	Windows, OSX, Android, I-Phone, Chromebook, Amazon, and Internet based versions
Evernote (http://evernote.com)	Knowledge/Note Binder crossplatform	FREE	Free Mobile App is avalible for Android and I-Phone	unlimted	Windows, OSX, Android, I-Phone
Hoot (Note2)	Reserve Item Digital Waiting List Manager	FREE	n/a	n/a	Windows
Schedule Source TeamWork (http://www.schedulesource.com/) (Note 4)	Staff Scheduling program that allows for substitutions as well	Contact for Price Quote (UIUC paid a price for package and then so much per person scheduled per month)	Mobile version is avalible and works with I-Phone, Android and Blackberry	Contracted for a per user	Internet based product
	Scheduling (for		Mobile web app.	Each free account can	

Doodle (https://doodle.com)	(staff or meetings)	FREE	Native apps for iPad and iPhone.	produce a poll (for scheduling) with up to 1000 participants	Internet based product
When to Work (http://whentowork.com/)	Staff scheduling	Varies depending on number of employees and payment plan. Free 30 day trial	Web based & Mobile app for Apple and Android devices	Various used ranges with coorresponding pricing based on the number of users.	Internet based product

Notes:

1. Tableau is a high end statistical package and to purchase it is very expensive (see the chart above for pricing options), there is however a free version (Tableau Public). At the Library Assessment Conference held in Seattle in 2014 it was very highly recommended by many librarians who were doing assessment and statistics. Since the 2014 conference Tableau continues to be highly touted by Librarians in the assessment field. Often College and University administration is already using Tableau for other than library purposes and you may be able to gain some access from those institutions. The free version (Tableau Public) is used by many librarians but data must be published openly and available to the public.

2. Hoot is a desktop based software program for library staff. Hoot helps manage a digital waiting list for checked-out reserve items. The system allow the desk staff to place a watch on the item so that the student can be notified by email or text message when the item is returned. The system can accommodate many students waiting for a single reserve item in the library and multiple wait lists in a library. Hoot works with information directly from Voyager. This applications developed by the Library Prototyping team at UIUC which is headed by Jim Hahn. Hoot is in use locally and seems very popular with staff and students alike. The program is available currently to a limited number of CARLI libraries if they wanted to BETA test it and is expected to available to all CARLI libraries sometime around June of 2016.

3. OneNote and Evernote are great cross platform tools and organizers and can be used in many different ways from organizing documents, work flows, information, etc. They both have strong searching capability. OneNote can be used with the cloud or more securely with SharePoint to synchronize across your various platforms. OneNote works as well on a Window machine as it does on a Mac or a smart phone. At UIUC it is used to process and manage community borrower and proxy forms, to search billing records from various formats including those that are scanned in, and to organize varied types of information into a central information management system.

4. Schedule Source Teamwork- personnel scheduler. Schedule Source Teamwork according to the company can help you: "1) Optimize your staffing in the most cost effective way, 2) Deploy qualified and capable staff while enforcing work rules and preferences, and 3) Facilitate managers, schedulers and employees working together in a team-oriented and morale-building way."

Use of learning management/course software for student worker training such as: Moodle, Compass, Blackboard, etc.. Also useful for this is Lib Guides and Wiki's.

The Public Services Committee welcomes comments, additions and updates to this list. Please contact the committee via CARLI support (mailto:support@carli.illinois.edu)

Members
Bryan Clark (2014-2016), Illinois Central College
Susan Duncan (2013-2016), University of Illinois at Urbana-Champaign
Sandy Engram (2014-2017), Illinois College of Optometry
Kelly Fisher (2015-2018), Eureka College
Amy LeFager (2014-2017), National-Louis University
Sarah Mueth (2015-2018), University of Illinois at Springfield
Marcella Nowak (2014-2017), College of DuPage
Jeff Ridinger (2013-2016), Illinois State University, **Chair**
Jennifer Stegen (2015-2018), Loyola University Chicago
CARLI Staff Liaisons: Debbie Campbell and Lorna Engels

The Resource Sharing Committee met for the first time at the CARLI Offices on August 6, 2015. Following that initial in-person meeting, the committee met via conference call on the third Thursday of each month, beginning in September.

Committee activities
- Hosted the webinar "Copyright for Resource Sharing" by Janet Brennan Croft. Presented November 10, 2015, and archived at https://www.carli.illinois.edu/products-services/i-share/circ/secure/CopyrightResourceSharing (66 registered). The webinar provided information to participants on Copyright Basics (a quick review of the history, philosophy, law, and guidelines); Interlibrary Loan: Law vs. License (including electronic sources and delivery); Copyright and the Classroom: K-12, Higher Education, and Media.

- Organized and hosted two resource-sharing themed "Open House" events for CARLI members. These events were a continuation of a format utilized the past two years to great success. A mix of centrally located institutions of varying sizes were chosen to best provide a glimpse at the wide-breadth of libraries that make up CARLI membership.
    - Illinois Wesleyan University/Illinois State University – April 8th (15 registered)
    - Illinois Institute of Technology/Illinois College of Optometry– April 21st (21 registered)

- The Annual Project for the Resource Sharing Committee is the development of a webpage that provides resources for Interlibrary Loan units that are interested in utilizing Open Access resources to enhance service levels. Content includes a brief introduction of the opportunities Open Access resources provide Interlibrary Loan, an annotated bibliography, and Open Access Resources list.

- Decision reached that the committee will recommend a $15 cap for processing fees, and presented a draft recommendation to CARLI for further review.

- Generated and contributed regular discussion topics for the CARLI Resource Sharing Interest Group (ResShare-ig) email list. Having committee led discussion topics continues to have the benefit of bringing timely topics to the larger community over the past two years. In addition, it has served as a perfect forum for the collecting of information from our state colleagues in order to promote topics covered in our webinar and annual report. Committee generated topics this past year included:

- o Accessing articles for Interlibrary Loan that are subject to embargoes
- o Interlibrary Loan Copyright Costs
- o Open Access and Interlibrary Loan
- o Keeping track of ILL requests filled with Open Access resources.

Rotating off the Resource Sharing Committee in July 2016 are Bryan Clark, Susan Duncan, and Jeff Ridinger. Three new volunteers will be added for the terms beginning 2015. The chair for the 2016-2017 term will be elected at our final meeting, scheduled for June 16, 2015.

Open Access and Interlibrary Loan

Overview

Open Access (OA) resources provide a wealth of material available for Interlibrary Loan units to fulfill patron requests. While OA materials are freely available to library users, they are often difficult for researchers to easily discover and access. Interlibrary Loan units that develop workflows that incorporate OA resources are able to improve the service they provide. With a body of readily available material, the library is able to fill a patron's request in a more timely manner while not having to rely on other institutions to fill the request. Cost saving benefits include fewer postage and associated copyright fees.

The Resource Sharing committee is pleased to provide:

- resources that may help Interlibrary Loan units utilize Open Access materials in their daily workflows (below, under Annotated Open Access Source List).
- access to a thorough discussion on the inventive ways interlibrary loan librarians are making use of OA materials (below, under Annotated Bibliography).

expand / collapse all

Introduction

In response to the January 2016 "Open Access and Interlibrary Loan" query to the Resource Sharing Interest Group email list, the CARLI Resource Sharing Committee learned that a number of institutions within the CARLI Resource Sharing community are already utilizing OA resources. The majority of libraries are taking advantage of Google Scholar, but mention was also made of ResearchGate for current articles, and Google Books and HathiTrust for electronic access to older monographs, and journal title runs. OA databases are available for direct searching; additionally, some libraries provide links to OA database content (e.g. Directory of Open Access Journals, PubMed Central) through their link resolvers. This provides their patrons direct access, reducing the number of ILL requests for articles available through OA.

Searching for the Open Access (OA) availability of an article is not always a first priority for libraries, especially during peak request periods. Many libraries will begin with a traditional request via OCLC. Often a web-based search is instigated only when attempting to verify a problematic citation, or one that cannot be easily filled through OCLC. That said, there are libraries that while, not looking actively for OA, do begin the search process looking for freely available copies before placing an ILL request on behalf of the patron. Budgetary considerations were listed as the motivating factor for beginning the process in this manner. A benefit of searching for OA materials, as opposed to a more general web search, is in the area of copyright. With OA materials, you can be confident that the copying and redistribution of the materials does not violate copyright law. The same cannot always be said about the pdfs available on the web, even in Google Scholar. When discovering materials on the internet, it is important for Interlibrary Loan staff to verify the source and determine that the party making the item available is doing so ethically. As mentioned above, OA materials will also help the library control their ILL copyright budget.

ILL staff are able to use Open Access resources to fill borrowing requests, and it is equally important to note that these resources can be used to fill lending requests. It is impractical for many requesting libraries to check for the availability of OA resources before the submission of each request. This might be due to the quantity of requests, or whether the institution allows their patrons to submit direct requests. Often there are too many places to look for free resources. As ILL staff search for OA resources for lending, they will become more familiar with what is available on the internet. OA allows libraries to provide access to materials when local copies are unavailable.

Definition

Open Access (OA) literature is digital, online, free of charge, and free of most copyright and licensing restrictions. from Suber, P. (2012). Open access. Cambridge, MA: MIT Press.

Levels of Open Access

1. Gold Open Access - Articles in fully accessible open access journals.
2. Green Open Access - Self-archiving, generally of the pre- or post-print version of a published article, often used in repositories.
3. Hybrid or Paid Open Access - Subscription journals with open access to individual articles usually when a fee is paid to the publisher or journal by the author, the author's organization, or the research funder.

from Burtle, L. (2016, April 26). *Types of Open Access*. Retrieved from http://research.library.gsu.edu/c.php?g=115588&p=754380 (http://research.library.gsu.edu/c.php?g=115588&p=754380)

Annotated Open Access Source List

Search Engines/Directories:

- **Google Scholar** (http://scholar.google.com (http://scholar.google.com)): Google Scholar provides a simple way to broadly search for scholarly literature. From one place, you can search across many disciplines and sources: articles, theses, books, abstracts and court opinions, from academic publishers, professional societies, online repositories, universities and other web sites. It is not all fulltext, but it does identify many works that may not be indexed in all library databases as it also searches publisher websites. One is allowed to save article records if one has a general Google account.
- **OAIster (Open Archives Initiative Database)** (http://oaister.worldcat.org/ (http://oaister.worldcat.org/)): This union catalog managed by OCLC (formerly U. of Michigan) contains more than 30 million records of Open Access materials contributed by over 1,500 organizations. Types of materials include digitized books, journal articles, newspapers, theses, photos, videos, and audio files.
- **OpenDOAR (Directory of Open Access Resources)** (http://www.opendoar.org/ (http://www.opendoar.org/)): This site provides a quality-assured listing of open access repositories around the world. OpenDOAR staff harvest & assign metadata and visit each site to ensure quality and consistency in the information provided. There are just over 3,000 resources, of which 2,200 are in English.

Books:

- **Google Books** (http://books.google.com (http://books.google.com)): This book discovery tool contains the full text of millions of public domain books from over 40 international libraries in multiple languages. It also searches copyrighted books, and provides a few context sentences within the search results to provide searchers with enough information to find   items in libraries or purchase them.
- **HathiTrust** (http://www.hathitrust.org (http://www.hathitrust.org)): This U.S. digital preservation repository and access platform contains seven million book titles and 370,000 serial titles, of which around 40% are in the public domain. A portion of publicly accessible HathiTrust records are searchable through the CARLI I-Share Libraries' VuFind catalogs, and items from the UIC and UIUC collections are included as two of the over 100 partner libraries.
- **Internet Archive** (https://archive.org/ (https://archive.org/)): This site is a non-profit library of 10 million texts, as well as movies, software, music & more. Its purposes include offering permanent access for researchers to historical collections that exist in digital format and it collaborates with institutions including the Library of Congress and the Smithsonian to preserve a record for generations to come.
- **Project Gutenberg** (http://www.gutenberg.org/catalog/ (http://www.gutenberg.org/catalog/)): This "first provider of electronic books'" has a mission to encourage the creation and distribution of ebooks. It contains 50,000 free ebooks that can be downloaded or read online in 238 categories.
- **Universal Digital Library** (http://www.ulib.org/ (http://www.ulib.org/)): This full text book repository of over 1.5 million titles contains items from the 16th-21st centuries. Collections are primarily from China, Egypt, India, and the U.S.

Conference Papers/Presentations:

- **All Academic** (http://research.allacademic.com/ (http://research.allacademic.com/)): This bare-bones site contains a repository of 90+ conference papers from a variety of disciplines from Sciences, to Social Sciences, to Humanities. It is searchable or browsable and content spans from the mid-2000s to the last 3

years and varies by association. It also contains a list of 80+ free journals.

General Journal Articles:

- **Directory of Open Access Journals** ([http://www.doaj.org/ (http://www.doaj.org/)](http://www.doaj.org/)): This directory contains over 10,000 international open access journals covering all areas of science, technology, medicine, social science and humanities. The DOAJ aims to be the one-stop shop for users of open access journals, although it is not an exhaustive list, as journals are vetted before being accepted. It is both searchable and browseable by subject area and contains mostly full-text articles.
- **Research Gate** ([https://www.researchgate.net/ (https://www.researchgate.net/)](https://www.researchgate.net/)): A free-to-join social Linked-In of sorts for scientists and researchers with over 9 million members who can upload their publications to share. Formats are author manuscripts and pre-print/accepted or published versions of scholarly articles.

Subject Specific Journals & Other Resource collections

Arts:

- **Internet Archive Audio Archive** ([https://archive.org/details/audio (https://archive.org/details/audio)](https://archive.org/details/audio)): This library contains recordings ranging from alternative news programming, to Grateful Dead concerts, to Old Time Radio shows, to book and poetry readings, to original music uploaded by our users. Many of these audios and MP3s are available for free download.
- **Internet Archive Moving Image Archive** ([https://archive.org/details/movies (https://archive.org/details/movies)](https://archive.org/details/movies)): This library contains digital movies uploaded by Archive users which range from classic full-length films, to daily alternative news broadcasts, to cartoons and concerts. Many of these videos are available for free download.
- **International Music Score Library Project** ([http://imslp.org/ (http://imslp.org/)](http://imslp.org/)): The purpose of the IMSLP is to gather all public domain music scores, in addition to the music scores of all contemporary composers (or their estates) who wish to release them to the public free of charge. IMSLP currently has 106,011 works, 349,706 scores, 39,791 recordings, 14,004 composers, and 369 performers.

Education:

- **ERIC** ([http://eric.ed.gov/ (http://eric.ed.gov/)](http://eric.ed.gov/)): ERIC, the Education Resource Information Center, is administered by the U.S. Department of Education and provides access to education literature and resources. The database contains more than 1.3 million records and links to more than 323,000 openly accessible full-text articles, books, and grey literature dating back to 1966.
- **OER Commons (Open Educational Resources)** ([https://www.oercommons.org/ (https://www.oercommons.org/)](https://www.oercommons.org/)): This project by the Institute for the Study of Knowledge Management in Education provides Open Educational Resources (OEDS) which are teaching and learning materials that may be used freely and downloaded to share. These resources include textbooks, lesson plans, full university courses, and interactive simulations.

Medicine:

- **Europe PubMed Central** ([https://europepmc.org/ (https://europepmc.org/)](https://europepmc.org/)): Europe PMC provides a single point of access to the 26 million abstracts available through PubMed,3.9 million PMC full-text articles (See record below), and an additional 5 million other relevant resources, such as patent records and theses. A consortium of the major biomedical and life sciences research funders in Europe require their grant holders to make their published research available as Open Access through EPMC.
- **PubMedCentral** ([http://www.ncbi.nlm.nih.gov/pmc/ (http://www.ncbi.nlm.nih.gov/pmc/)](http://www.ncbi.nlm.nih.gov/pmc/)): PubMed Central (PMC) is a free full-text archive of biomedical and life sciences journal literature at the U.S. National Institutes of Health's National Library of Medicine. Over 3.9 million journal articles are archived from 5,880 journals. Not all titles and articles are Open Access, but those which are have an OA symbol indicating so.
- **PubMedCentral Canada** ([http://pubmedcentralcanada.ca/pmcc/ (http://pubmedcentralcanada.ca/pmcc/)](http://pubmedcentralcanada.ca/pmcc/)): PMC Canada contains citations and abstracts for over 2.6 million full text peer-reviewed journal articles in the fields of health and life sciences. PMC Canada only accepts open access research funded by the

Canadian Institutes of Health Research (CIHR) for its repository.

Science & Math:

- **ArXiv.org** (Math & Sciences) ([http://arxiv.org/ (http://arxiv.org/)](http://arxiv.org/)): ArXive is an electronic archives and distribution server for nearly 1.15 million open access research articlesin Physics, Mathematics, Computer Science, Quantitative Biology, Quantitative Finance and Statistics. Authors may submit their research to the site, which is maintained and operated by the Cornell University Library. Submissions are reviewed by expert moderators to verify that they are topical and contributions follow accepted standards of scholarly communication.

- **CiteSeerx** (Computer & Information Science) ([http://citeseerx.ist.psu.edu/ (http://citeseerx.ist.psu.edu/)](http://citeseerx.ist.psu.edu/)): CiteSeerx was one of the first academic paper search engines originally developed at Princeton in 1998. Today, it is an evolving scientific literature digital library that focuses primarily on the literature in computer and information science. CiteSeerx crawls publicly available scholarly documents, so most of the content is open access.

- **Digital Library for Physics and Astronomy** ([http://adswww.harvard.edu/ (http://adswww.harvard.edu/)](http://adswww.harvard.edu/)): This digital library is operated by the Smithsonian Astrophysical Observatory (SAO) under a NASA grant. Its Astrophysics Data System maintains three bibliographic databases containing more than 12.0 million records covering publications in Astronomy and Astrophysics, Physics, and the arXiv e-prints. Records also include links to external resources like publisher website articles. This may contain some open access, but does not exclusively provide full-text sources.

- **Highwire** ([http://highwire.stanford.edu/lists/freeart.dtl (http://highwire.stanford.edu/lists/freeart.dtl)](http://highwire.stanford.edu/lists/freeart.dtl)): This site is a directory of over 500 science journals (with links to their websites) that are published online through HighWire Press with free full-text articles. There are over 2.4 million full-text articles in these, but you will have to go directly to the journals, as it is not a database site.

- **Organic Eprints** ([http://orgprints.org/ (http://orgprints.org/)](http://orgprints.org/)): This international open access archive specializes in e-publications related to organic food and farming. The archive will accept any document - published or unpublished, so not all sources are scholarly.

- **Project Euclid (Math & Statistics)** ([https://projecteuclid.org/ (https://projecteuclid.org/)](https://projecteuclid.org/)): Project Euclid is a nonprofit publishing service which hosts math and statistics journals, monographs, and conference proceedings. Around 70% of PE's journal articles are openly available and it provides access to over 1.2 million pages of content. Only 22 of the journals indexed are entirely open access, though.

- **Public Library of Science (PLOS)** ([https://www.plos.org/publications/journals/ (https://www.plos.org/publications/journals/)](https://www.plos.org/publications/journals/)): PLOS is a nonprofit Open Access publisher that advocates for a more open "ethos" in scholarly publishing. It has published over 165,000 articles from 160 countries' authors and produces its own series of Open Access publications including the multi-disciplinary PLOSOne, PLOS Medicine & PLOS Biology.

- **Science.gov** ([http://www.science.gov/ (http://www.science.gov/)](http://www.science.gov/)): Science.gov is a search gateway to over 200 million pages of government science information from over 2200 sites, including MedlinePlus, NASA, ClinicalTrials.gov, and ERIC. Retrieved search records include links to articles in other databases, websites, abstracts, and e-books.

Social Science:

- **Social Science Research Network** ([http://www.ssrn.com/en/ (http://www.ssrn.com/en/)](http://www.ssrn.com/en/)): The SSRN's Electronic Paper Collection contains over 59,000 downloadable full text pdf documents, and the site also abstracts over 668,000 scholarly working & forthcoming papers. Author contact information is provided for follow-up.

Newspapers:

- **Chronicling America** ([http://chroniclingamerica.loc.gov/ (http://chroniclingamerica.loc.gov/)](http://chroniclingamerica.loc.gov/)): Sponsored by National Endowment for the Humanities and Library of Congress. Has a US newspaper directory from 1690 to the present and digitized newspapers from all over the US ranging from 1836 to 1922. The directory of newspaper titles contains nearly 140,000 records of newspapers and libraries that hold copies of these newspapers. The title records are based on MARC data gathered and enhanced as part of the NDNP program. They can be searched via opensearch. See above for Illinois's contributions.

- **Historical Newspapers** (Open Access LibGuide page -http://libguides.library.hunter.cuny.edu/content.php?pid=198058&sid=1656877 (http://libguides.library.hunter.cuny.edu/content.php?pid=198058&sid=1656877)): These are meant to be a collection to preserve American history. Links to sites are listed under the states, but some are dead links. (Illinois's comes up blank) National newspapers are listed at the end. The oldest one is the Virginia Gazette from 1736 to 1780. Most cover the 1800s to early 1900s, the Northern New York Historical Newspapers goes up to 2007.
- **Illinois Digital Newspapers Collection** (http://idnc.library.illinois.edu/ (http://idnc.library.illinois.edu/)): This collection was developed by UIU and is comprised of digital facsimiles of newspapers and trade journals (1831-1975). Anyone can correct the accompanying text file if they see a mistake, in fact they encourage it.. These are mostly due to the deteriorated images of old scans. When you click on an article in the facsimile a box appears with the text printed out. They will be aggregated and maintained by the Library of Congress via the Chronicling America database.
- **Wikipedia List of Online Newspaper Archives** (http://en.wikipedia.org/wiki/List_of_online_newspaper_archives (http://en.wikipedia.org/wiki/List_of_online_newspaper_archives)): This archive has both free and paywall content. Include some journals. Many of the graphic archives are indexed into searchable text databases. Older items are in image format, so no cutting or pasting. Some items won't allow access until they have been proofread. On the right is a link to every country and within that every state. This then brings up a list of publications available including the links to many of them. It also states on the list whether they are free and if they are only indexes.

Theses/Dissertations:

- **EThOS** (http://ethos.bl.uk/ (http://ethos.bl.uk/)): This has the UK's doctoral research theses. Any PHDs supported by the British Research Council have to be made available in their entirety. In fact any publication that comes from publicly funded research must be freely available. I understand that they try have links to all theses, not just those supported by public funds and of these others some may be free some not. Depending on the University the user may have to pay digitization costs up to £54.48 (~$80.00) Only 45 out 132 universities take on the price of digitizing.
- **OhioLINK** (https://etd.ohiolink.edu (https://etd.ohiolink.edu)): Electronic Theses and Dissertations abstracts by Ohio undergrads, masters, and PHD students from participating Ohio LINK schools. The institution decides when a paper is ready for distribution full text on the public site. Should also have access through major internet search engines. They also submit to Proquest/UMI.
- **PDQT Open** (http://pqdtopen.proquest.com/ (http://pqdtopen.proquest.com/)): This is an online repository of Open Access graduate works. The authors choose to have their dissertations or theses published in open access. It's a new service offered by Proquest/UMI.
- **Theses Canada Portal** (http://www.bac-lac.gc.ca/eng/services/theses/Pages/theses-canada.aspx (http://www.bac-lac.gc.ca/eng/services/theses/Pages/theses-canada.aspx)): Only loans within Canada and even then they will not loan something available anywhere else in Canada even if only for a fee.

Annotated Bibliography

- Baich, T. (2012). Opening interlibrary loan to open access. Interlending and Document Supply, 40 (1). 55-60.
    - Study conducted of the interlibrary loan requests placed by patrons of Indiana University-Purdue University Indianapolis (IUPUI) during 2010 and 2011 to determine the impact of open access resources on interlibrary loan requests. The article describes the workflow for processing interlibrary loan requests for open access materials using the OCLC ILLiad system. The study concludes that interlibrary loan requests are not likely to decrease with the availability of open access resources because users will still need assistance from librarians to find the materials freely available online.

- Baich, T. (2015). Open access: Help or hindrance to resource sharing?" Interlending and Document Supply, 43 (2), 68-75.
    - This article discusses the author's findings when researching the issue of why are patron's still placing Interlibrary Loan requests for material that is openly available. The authors is able to draw on data collected from IUPUI that appears to contradict the widespread notion that Open Access materials will lead to fewer ILL requests. "Users clearly find it easier to request through ILL rather than completing the search process themselves, even though this means a delay in access." (74)

Data did show that requests for OA available had increased over time, they still only made up a small portion of the overall requests. What will be interesting for ILLiad users was the author's mention of how the product can assist in the tracking of OA requests by supporting the "creation of custom routing rules, queues (including "Awaiting Open Access Searching" and "Awaiting Thesis Processing") and emails that assist staff in automating workflows." (70) Finally, the author presents three possible benefits that Open Access provides Interlibrary Loan staff: the increased ability to fill requests, especially for thesis/dissertations and conference papers and reports; increased speed in filling requests due to reduced turnaround time; and cost-savings on borrowing, shipping, and copyright fees.

- Berger, M., & Cirasella, J. (2015). Beyond Beall's list: Better understanding predatory publishers. College & Research Library News, 76 (3), 132-135.
  - This article discusses concerns about predatory open access journals that charge article authors exorbitant article processing fees and produce low quality content that is falsely advertised as peer reviewed. Beall's list refers to the curated list of possible predatory publishers of open access journals created by Jeffrey Beall, librarian at the University of Colorado-Denver. Berger and Cirasella discuss issues with Beall's list due to his potential negative bias towards open access publishing. While the authors express concern with Beall's bias they do cite his criteria for identifying predatory open access journals as a useful tool that can be used by librarians and scholars to evaluate the quality of open access journals. The Directory of Open Access Journal and the Open Access Scholarly Publishers Association are noted for providing vetted lists of quality open access journals.

- Crawford, W. (2011). Open access: What you need to know now. Chicago: American Library Association.
  - This 76 page "Special Report" by frequent American Libraries columnist Crawford, covers issues related to Open Access, teaches how librarians can become OA activists, and provides sources for understanding, tracking, and using OA. It is a nice overview particularly catered to librarians on why OA is important to libraries and our patrons while also presenting the publisher's perspective. It covers the factors that led to the OA movement (STEM journal price gouging), covers what OA is like today, and predicts its future.

- Hu, F., & Jiang, H. (2014). Open access and document delivery services: a case study in Capital Normal University Library. Interlending & Document Supply, 42(2-3), 79-82.
  - The authors suggest marketing OA resources to library users to make them better aware of OA, particularly because many already are using internet (rather than library) sources to find research, but also in the interest of quick access. The authors also suggest that OA resources should be utilized in conjunction with document delivery services. Specific recommendations include making the search of OA resources part of the daily document delivery workflow, integrating OA resources into the OPAC, and the creation of instructional materials about OA for library users. The conclusions drawn in this article seem very similar to the goals of the group project.

- Kohn, K. (2006). Finding it free: Tips and techniques for avoiding borrowing fees and locating online publicly available materials. Journal of Interlibrary Loan, Document Delivery & Electronic Reserve, 16 (3), 57-65.
  - This dated 2006 article discusses strategies used by Kohn when she worked as Assistant Librarian at Polisher Research Institute of the Madlyn and Leonard Abramson Center for Jewish Life in North Wales, PA. The main focus is on the utility of medical library consortia and reciprocal borrowing agreements, formal or informal. There is one page of OA discussion, followed by an annotated list of sites (Directory of Open Access Journals (http://www.doaj.org/), FindArticles (www.findarticles.com), Google Scholar (http://scholar.google.com/), OAIster (www.oaister.org), FreeMedical Journals (www.freemedicaljournals.com), HighWire Press (http://highwire.stanford.edu) and PubMed Central (http://pubmedcentral.gov).

- Martin, R. A. (2010). Finding free and open access resources: A value-added service for patrons. Journal of Interlibrary Loan, Document Delivery & Electronic Reserve, 20 (3), 189-200.
  - 2010 article by the then head of Access Services at NIU asserts that it's time to include searches for OA material as part of a library's regular search processes in order to stay relevant to users. She gives a brief historical overview of and current issues with each of the following types of OA

materials:
- ▪ Open access Journals and Self-archiving
- ▪ Open Textbooks
- ▪ Open Educational Resources
  - ○ The author gives many examples of relevant sites, along with some pros/cons and search capabilities. This article could serve as a starting point for libraries trying to develop a procedure for checking for OA availability when doing ILL or reference.

- Morrison, H. G. (2006). The dramatic growth of open access: Implications and opportunities for resource sharing. Journal of Interlibrary Loan, Document Delivery & Electronic Reserve, 16 (3), 95-107.
  - ○ The author says that the growing number of open access resources demonstrates that open access is the future of access. She goes on to show examples of many different resources and how they can be used in a library setting. However, this does not preclude the problems that still face ILL and open access. Problems such as multiple versions of an article or the disappearance of an article crop up often.

- Mullen, L. B. (2010). Open access and its practical impact on the work of academic librarians: Collection development, public services, and the library and information science literature. Oxford: Chandos Publishing.
  - ○ Written by a practicing "frontline" librarian at Rutgers, this book touches upon different issues facing academic librarians as both scholars and practitioners in regards to open access aspects. Brief information is discussed about open access and the impact on interlibrary loan regarding the research habits of users preferring immediate access to articles with a majority of users utilizing interlibrary loan services only occasionally. As institutional repositories and other open access resources become available interlibrary loan departments will need to shift focus from obtaining sources from other libraries to directing users to open access resources (p. 134).

- O'Brien, K. (2015). Large-scale book and journal digitization projects and interlibrary service: Opening the discussion. Journal of Interlibrary Loan, Document Delivery & Electronic Reserve, 25 (1-2), 39-42. doi:10.1080/1072303X.2016.1150380
  - ○ The author is the Assistant Special Collections and Access Services Librarian at the University of Illinois Chicago Library of the Health Sciences and he posits that, although digitization is currently limited by U.S. copyright law, and most digitized content is limited to material in the public domain, the courts have shown support for digitization and libraries should be adapting their workflow to take advantage of it. The article discusses difficulties with using Hathi Trust and Internet Archive resources to fill interlibrary loan requests, and provides suggestions for and ways to incorporate these open access resources into interlibrary loan workflows. The article also calls for the establishment of best practices for utilizing open access resources to fill interlibrary loan requests.

- Open education resources (OERs). (n.d.). Retrieved from https://jisc.ac.uk/guides/open-educational-resources (https://jisc.ac.uk/guides/open-educational-resources)
  - ○ Many aspects of open resources are discussed in this paper from a legal, ethical and research point of view for many countries and universities. Links to many resources are included.

- Shear, L., Means, B., & Lundh, P. (2015, June). Research on open: OER research hub review and futures for research on OER. Menlo Park, CA: SRI International. Retrieved from http://www.hewlett.org/sites/default/files/OERRH%20Evaluation%20Final%20Report%20June%202015.pdf (http://www.hewlett.org/sites/default/files/OERRH%20Evaluation%20Final%20Report%20June%202015.pdf)
  - ○ Since 2002 the Hewlett Foundation has been an important driver in the movement toward high-quality free and open content, and has funded a wide assortment of major programs in Open Educational Resources (OER) development and research. The report focuses on the OER Research Hub (OERRH), based at the Open University in the UK. (1) This 23 page report summarizes the results of the evaluation, and draws implications for future needs in the field of OER research. (2).

- Suber, P. (2012). Open access. Cambridge, MA: MIT Press.
  - ○ This book provides a great overview of open access topics and, while not geared specifically to librarians, contains information that is relevant to the profession about scholarly research practice. Peter Suber is the director of the Harvard Open Access Project, a faculty fellow at the Berkman

Center for Internet & Society, and Senior Researcher at SPARC (Scholarly Publishing and Academic Resources Coalition). He is widely considered the de facto leader of the world-wide open access movement. Suber provides multiple reasons why open access is beneficial to both authors and readers of scholarly literature. He provides definitions for different types of open access resources, and briefly discusses the potential impact of the availability of open access journals on libraries deciding to cancel subscriptions to journals they pay to access.

- Suber, P. (2015, December 5). Open access overview. Retrieved from http://legacy.earlham.edu/~peters/fos/overview.htm (http://legacy.earlham.edu/~peters/fos/overview.htm)
    - This brief overview to Open Access by OA leader Suber serves as a useful introduction to OA's main elements. It features hyperlinked key concepts and further reading section, making it reminiscent of an online encyclopedia article.

- Wiley, L., & Chrzastowski, T. (2005). The impact of electronic journals on interlibrary lending: A longitudinal study of statewide interlibrary loan article sharing in Illinois. Library Collections, Acquisitions, and Technical Services, 29 (4), 364-381.
    - This study compares trends in resource sharing of articles from 1995/1996, 1999/2000, and 2002/2003. The data is from an early transitional period to e-journals, but a trend showed there were fewer ILL requests for articles in the 2002/2003 study indicating that local access to e-journals resulted in fewer requests. There was a 20% overall drop in ILL requests for articles from 1999/2000 to 2002/2003. Embargoed journals are briefly mentioned as an issue with libraries providing access to e-journals and resulting in ILL requests for articles from journals that are owned by the library in e-journal format. At the time the article was published it is highly likely that the requests were easily filled by other libraries that maintained a print subscription to the journal since a major migration from print to e-journals happened more recently due to better database interfaces, link resolvers, and increasing need to budget and space management.

2015–2016 CARLI SFX Systems Committee:
Annual Report of Activities

Members:
Xiaotian Chen (2013-2016), Bradley University
Lauren Jackson-Beck (2013-2014), Aurora University
Max King (2015-2018), Illinois Institute of Technology, **Vice-chair**
Joanna Kolendo (2014-2016), Chicago State University
Jeffrey Matlak (2014-2017), Western Illinois University
Andy Meyer (2014-2017), North Park University
Steve Oberg (2013-2016), Wheaton College, **Chair**
Cindy Scott (2015-2018), University of St. Mary of the Lake
Peter Tubbs (2015-2018), Rush University
CARLI: Paige Weston (retired), Denise Green, and Mary Burkee

Meetings
July 9, 2015 in-person meeting at the CARLI office. Monthly meeting held on the second Wednesday of the month, from 1:00pm–2:00pm. Also held SFX Interest Group Open Conference Calls on a quarterly basis (16 September 2015, 8 December 2015, and 2 March 2016).

Activities
The primary focus of activity this year was to create a set of handouts for SFX administrators about how SFX can integrate with other services. We selected the following services to highlight:
- 360 Core (ProQuest)
- BrowZine (Third Iron)
- CrossRef
- EBSCO Discovery Service
- EZProxy (OCLC)
- Google Scholar
- ILLiad (OCLC)
- Primo (Ex Libris)
- PubMed LinkOut and Outside Tool Service (NLM)
- WorldCat Local (OCLC)
- WorldCat.org (OCLC)

The committee also approved a change in process for the weekly SFX KB updates such that CARLI staff began to activate free and open access titles in the shared SFX instance following previously approved selection guidelines. This additional service was well received by CARLI members.

We discussed survey results from SFX administrators whom we asked to provide feedback about open conference calls, which informed our planning for additional open conference calls. The results indicated that the SFX administrator community found value in the calls.

Max King volunteered to serve this year as vice-chair and will assume chair responsibility for FY17. Some additional progress was made on the instructional webinars the committee has worked on for the past 2-3 years, although the bulk of the work has been completed.

Discussions
- Enhancements to the "Report a Broken Link" feature
- Handling of problematic SFX KB update that affected many high use EBSCOhost databases
- Auto-update Elsevier holdings process

Deliverable
Please see https://www.carli.illinois.edu/products-services/link-resolver-sfx/sfx-integration-other

SFX and Integration with Other Products

The SFX OpenURL software created by ExLibris allows users the ability to search and link to article level information. SFX administrators can integrate SFX with other library technology systems and services such as: EZproxy, WorldCat, ILLiad, Crossref, BrowZine, Google Scholar, PubMed, ProQuest 360 Core and EBSCO Discovery Service. The following documents are intended to provide SFX administrators with an overview of these systems and the advantages and disadvantages to their SFX integration.

expand / collapse all

360 Core (ProQuest)

General Information Sheet on 360 Core (ProQuest)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/360Core.pdf)

BrowZine (Third Iron)

General Information Sheet on BrowZine (Third Iron)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/BrowZine.pdf)

CrossRef

General Information Sheet on CrossRef
(http://www.carli.illinois.edu/sites/files/sfx/documentation/CrossRef.pdf)

EBSCO Discovery Service

General Information Sheet on EBSCO Discovery Service
(http://www.carli.illinois.edu/sites/files/sfx/documentation/EBSCO-Discovery.pdf)

EZProxy (OCLC)

General Information Sheet on EZProxy (OCLC)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/EZProxy.pdf)

ILLiad (OCLC)

General Information Sheet on ILLiad (OCLC)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/ILLiad.pdf)

Primo (Ex Libris)

General Information Sheet on Primo (Ex Libris)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/Primo.pdf)

WorldCat Local (OCLC)

[General Information Sheet on WorldCat Local (OCLC)](http://www.carli.illinois.edu/sites/files/sfx/documentation/WorldCat-Local%28OCLC%29.pdf)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/WorldCat-Local%28OCLC%29.pdf)

WorldCat.org (OCLC)

[General Information Sheet on WorldCat.org (OCLC)](http://www.carli.illinois.edu/sites/files/sfx/documentation/WorldCat%28OCLC%29.pdf)
(http://www.carli.illinois.edu/sites/files/sfx/documentation/WorldCat%28OCLC%29.pdf)

2015–2016 CARLI Technical Services Committee:
Annual Report of Activities

Members:

Melissa Burel (2015–2018), Southern Illinois University Edwardsville
Keith Eiten (2014–2017), Wheaton College, **Co-chair**
Ann Heinrichs (2014–2017), Catholic Theological Union, **Co-chair**
Mary Konkel (2014–2017), College of DuPage
Mingyan Li (2015–2016), University of Illinois at Chicago
Joelen Pastva (2015–2018), University of Illinois at Chicago
Sandy Roe (2015–2018), Illinois State University
Mary Tatro (2013–2016), Augustana College
CARLI Staff Liaisons: Jennifer Masciadrelli and Nicole Swanson

2015–2016 Accomplishments:

- Conducted the Technical Services Spring Forum, entitled *Cataloging and Database Maintenance: MarcEdit and More,* at Heartland Community College, Normal, IL, on April 21, 2016. Presenters came from the University of Chicago, University of Illinois Chicago, Chicago State University, Wheaton College, and CARLI. A total of 51 librarians from around Illinois attended the day-long event. (https://www.carli.illinois.edu/products-services/i-share/cat/TSCSpringForum2016_MarcEdit)

- For the 2016 Annual Project, developed the document *Using MarcEdit for Database Maintenance: A Select Primer*: https://www.carli.illinois.edu/sites/files/i-share/documentation/2016TechnicalServices_MarcEditForDbaseMaintPrimer.pdf

- Partially revised the consortial cataloging policy document *Cataloging Electronic Resources* (https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cater2009_finalreport.pdf) (revision to continue in 2016–2017)

- Formulated recommendations for CARLI members pursuant to changes in the National Library of Medicine's January 2016 directives regarding MeSH headings: https://www.carli.illinois.edu/products-services/i-share/cat/mesh-recs

- Regularly updated the RDA Resources webpage https://www.carli.illinois.edu/products-services/i-share/cat/rda-resources and Calendar of Upcoming RDA Trainings http://www.carli.illinois.edu/products-services/i-share/cat/rda-resources-upcoming-training.

- The committee's 2014–2015 Annual Project, *Exploring Shelf-Ready Services* (https://www.carli.illinois.edu/exploring-shelf-ready-services), was published online on February 22nd as part of the Cataloging News Column in *Cataloging & Classification Quarterly* v.54, no. 3 (2016).

Future Plans:

The Technical Services Committee envisions several ways to explore technical services issues in the future:

- Hold a forum centered around what various CARLI members are doing with both database maintenance and technical reports such as Access reports.

- Feature database maintenance projects: priorities and recommendations, especially in light of I-Share NEXT—clean-ups that would help smooth the transition.

- Show how to change updated LCSHs (in ways other than one-by-one).

- Create an educational project to help implement the use of LC's Genre/Form Terms (‡2 lcgft) (maybe collaborate with another CARLI committee at some point) and also the use of LC's newly issued Demographic Group Terms (in authority records: 385/386 ‡2 lcdgt).

- Provide more training videos for technical services staff *–and/or–* assist CARLI staff in developing more training videos.

2015-2016 Technical Services Committee Annual Project:
MarcEdit for Database Maintenance: A Select Primer

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I. GENERAL INTRODUCTION TO MARCEDIT

MarcEdit is a software product that can be used to edit MARC records. It was developed by Terry Reese, head of Digital Initiatives at the Ohio State University Libraries. It is available to all libraries as a free download at [Terry Reese's website.](#) While you can use MarcEdit to edit records one at a time like the Voyager cataloging client, it is its ability to perform the same change or many different changes within groups of records that makes it such a useful tool. This ability to do batch processes means that catalogers have a powerful and time-saving tool to use to enhance our catalog records.

MarcEdit is a suite of tools, not all of which are needed for performing basic editing tasks. MarcEditor is the primary tool you will need to edit bibliographic records. MARC Tools is primarily for converting to and from different metadata formats.

The terminology that MarcEdit uses may be obscure to some librarians. A machine-readable or "raw" MARC record is not like the human- or eye-readable MARC records that we are used to seeing in the OCLC Connexion Client or in the Voyager cataloging client. A "raw" MARC record looks like this:

```
4500001000700000000800410000703500230004803500120007104000240000
8304500009001070480015001160490009001310900018001400920019001581
00004000177240005400217245008200271260003700353300002200390490
00032004126500056004447400022005009500065005222753437806130q190
01993nyuzzz            n     N/A d  a(OCoLC)ocm03970151  9D388157
aMANcMANdm.c.dICW  au8v5  asa02asb01  aICWD  aM353.B13b.I5
a785.737bB122k1 aBach, Johann Sebastian,d1685-
1750.10aInventions,mharpsichord,nBWV 787-801;oarr.10a15
terzetti :b(after 3-part inventions) : for two violins and
viola /cBach.  aNew York :bE.F. Kalmus,c[19--]  a3 parts ;c31
cm.0 aKalmus chamber music series 0aString trios (Violins (2),
viola), ArrangedxParts.01aFifteen
terzetti.10b33124001790996cMSXd785.737
```

Image of a raw MARC record

While some parts of record in this format are readable by the human eye, others are not. In order for a person to read and edit the MARC record, it must be "broken." A "broken" MARC record thus looks like something much more familiar:

```
=LDR   00837ccm   2200253Ia 4500
=001   275343
=008   780613q19001993nyuzzz\\\\\\\\\\n\\\\N/A\d
=035   \\$a(OCoLC)ocm03970151
=035   \\$9D388157
=040   \\$aMAN$cMAN$dm.c.$dICW
=045   \\$au8v5
=048   \\$asa02$asb01
=049   \\$aICWD
=090   \\$aM353.B13$b.I5
=092   \\$a785.737$bB122k
=100   1\$aBach, Johann Sebastian,$d1685-1750.
=240   10$aInventions,$mharpsichord,$nBWV 787-801;$oarr.
=245   10$a15 terzetti :$b(after 3-part inventions) : for two
violins and viola /$cBach.
=260   \\$aNew York :$bE.F. Kalmus,$c[19--]
=300   \\$a3 parts ;$c31 cm.
=490   0\$aKalmus chamber music series
=650   \0$aString trios (Violins (2), viola), Arranged$xParts.
=740   01$aFifteen terzetti.
=950   10$b33124001790996$cMSX$d785.737
B122k$k930118$mWCL$nBML$s26$tBX
```

Image of a Broken MARC Record

MARC records as they appear in the Voyager cataloging client and in the OCLC Connexion Client are already displayed in the "broken" form, even though that terminology is not used there.

The primary editing functions are in the MarcEditor tool. MarcEditor has word processor-like find and replace functions in a couple of varieties. There is a universal find and replace, which will perform the changes on a text string that it finds anywhere in the file. There also are "Edit field" and "Edit subfield" tools; these will find and replace text just like the universal find and replace does, but can be limited to particular MARC fields or subfields as needed.

Yet another way of editing records is by using regular expressions, sometimes shortened to "regex." A regular expression is a special text string for describing a search pattern. Those with some experience with computer programming languages may have some knowledge of regex. Otherwise, consult with CARLI staff or the larger MarcEdit user community for help in devising a regular expression that will meet your needs.

It is important to remember that the MarcEdit tools described here can only copy your MARC records and manipulate those copies. The corresponding records in your library's database will not change until you submit the records you have edited to CARLI for uploading and replacing. This is a handy feature, because it allows a cataloger to edit and then check the results of the edit to ensure there were no unintended consequences. In other words, you could do a lot of damage to your records in an attempt to edit them, but nothing really happens to them in Voyager until you are sure the edits made are what you intended and you submit them to CARLI for uploading. CARLI staff acknowledge this danger in the warning that appears in the MarcEdit section of the [Voyager Clients and Tools web page:](#)

"IMPORTANT NOTE: Any errors made to bibliographic, holdings, or authority records using any of MarcEdit are the responsibility of the library to correct locally. The CARLI Office will NOT restore any database because of errors made to records by imprudent or incorrect use of this tool. By installing and running MarcEdit, the library accepts this policy."

A Typical Workflow for Editing a Group of Records in MarcEdit
1. Identify and gather records that need to be edited. (See Part II below, "Ways to Identify/Gather Records.")
2. Since the records you get will be "raw" MARC records (.mrc files), use MarcBreaker to "break" them into an editable form (.mrk files).
3. Use the various editing tools in MarcEditor to make the desired changes to your records.
4. Save the file in MarcEditor.
5. Convert the "broken" records back into regular MARC records (i.e., convert from .mrk to .mrc) using MarcMaker.
Steps 6-8 pertain to I-Share libraries only
6. File a [Work Request Online](#) (WRO, pronounced *roe*) requesting that CARLI staff replace the MARC records in Voyager with the corresponding (now edited) records in the file.
7. Transfer the edited MARC records file to CARLI's FTP site so that CARLI staff can access it.
8. CARLI staff will upload and replace the records, and will notify you when that has happened.

II. WAYS TO IDENTIFY/GATHER RECORDS

A. For I-Share Members: Extract Records from Voyager Using Access Reports and WROs

Step 1. Identify the records using Access reports

In Access, you will find a list of queries in the left-hand column. Some are "prepackaged" by Ex Libris, but if you have linked the CARLI_Reports_2015.mdb file, you will also have access to queries written by CARLI staff and I-Share colleagues. You may or may not find a query that describes the set of records you wish to edit.

a. **If you find a query that matches what you want**, double-click on it. The results appear on the right and will include a list of records by ID number (Bib ID or MFHD ID). Export the results and open them in Excel to examine and/or manipulate the list. (For further details about using Access, view CARLI's Access training videos.)

b. **If no pre-existing query listed in Access exactly describes what you need**, file a WRO to ask CARLI staff to write a query according to your specifications.
   - Under *Work Request Type*, choose *Ad Hoc (Customized) Report*.
   - Under *Notes*, describe your desired record set.
       Examples:
       - Find bib records where 100 $d, 600 $d, or 700 $d contains <ca.>
       - Find bib records where 130 $a or 630 $a is <Koran>

   CARLI staff will then construct a custom-made query for you and notify you when the query results are ready. Those results will be delivered either through email or to your I-Share library's FTP site as an .xls, .xlsx., .xml, .txt, or .csv document.

Step 2: File a WRO for CARLI to extract the records

To request a file of your designated records from CARLI, submit a WRO.
   - Under *Work Request Type*, choose *Other*.
   - Note that the way CARLI extracts records from the catalog database is via record IDs. So, to designate which records you want, copy the record IDs into a .txt document (Notepad) and upload it to your library's I-Share FTP site.
   For further details about using WROs, see http://www.carli.illinois.edu/using-work-requests-online.

Step 3: Retrieve your records

CARLI notifies you when your file is ready. Get it from your library's FTP site. It is a .mrc file. Now you are ready to import that file into MarcEdit.

B. For All CARLI Members: Obtaining Records from Vendors

Sometimes a vendor makes sets of MARC records available to libraries or library consortia. When your library licenses a new collection, inquire! For example, libraries that subscribe to ProQuest Dissertations & Theses can obtain title-level MARC records for their institution's online dissertations and theses. In all cases, a library will need to obtain availability information from the vendor and follow their instructions. Some vendors, such as ProQuest, will send MARC record sets by email attachment; others provide a website from which you can download the appropriate batch of MARC records. While some vendors provide MARC records free of charge, other vendor records can be quite costly, and/or come with restrictions about whether their MARC records must be restricted to a library's local catalog, can be shared through a consortial database, or promoted to WorldCat. Record sets, such as the one for eHRAF World Cultures, are also available to OCLC member libraries through OCLC WorldShare Collection Manager. In all cases, the quality of the records you receive in batch should be evaluated before you load them into your catalog. MarcEdit functions can help.

III. PROJECT DEMONSTRATIONS

IIIa. REPLACING THE PROXY SERVER URL IN A BATCH OF BIB RECORDS USING MARCEDIT

This tutorial begins assuming that you already have a batch of MARC records saved to your computer that you would like to edit.

1. Open MarcEdit and select MarcEditor.
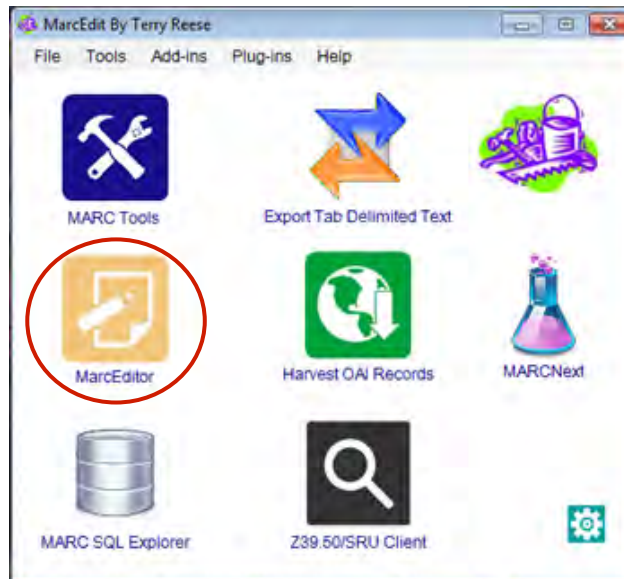
2. In MarcEditor, go to "File" and select "Open."
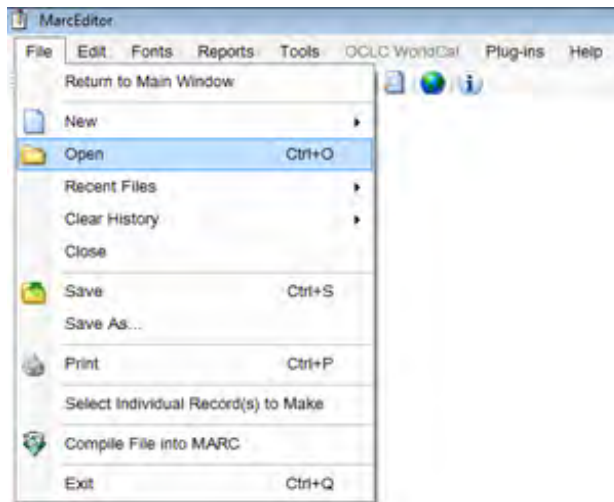
3. Navigate to the file that contains your batch of MARC records and select Open. (You may need to select "All Files" in order to see your batch of records.)

4. Now is a good time to check to see how many proxy URL changes you will be making in your batch of records. MarcEdit can tell you how often your proxy URL appears in your batch by going to "Edit" and then selecting "Find."
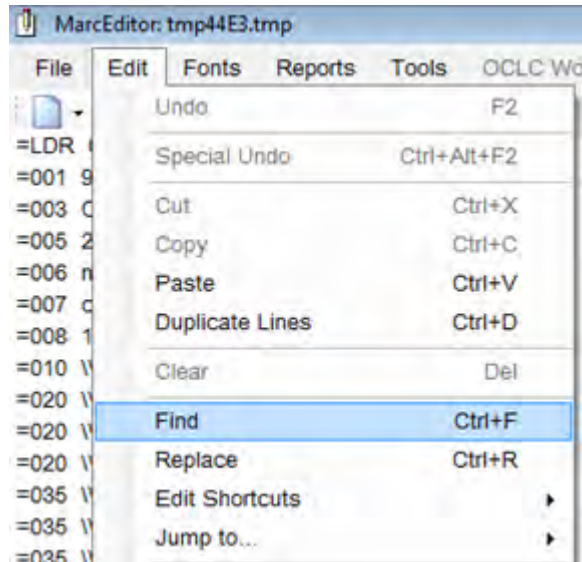
5. In the Find pop-up window, paste in your proxy URL in the "Find what:" box and then select "Find all."
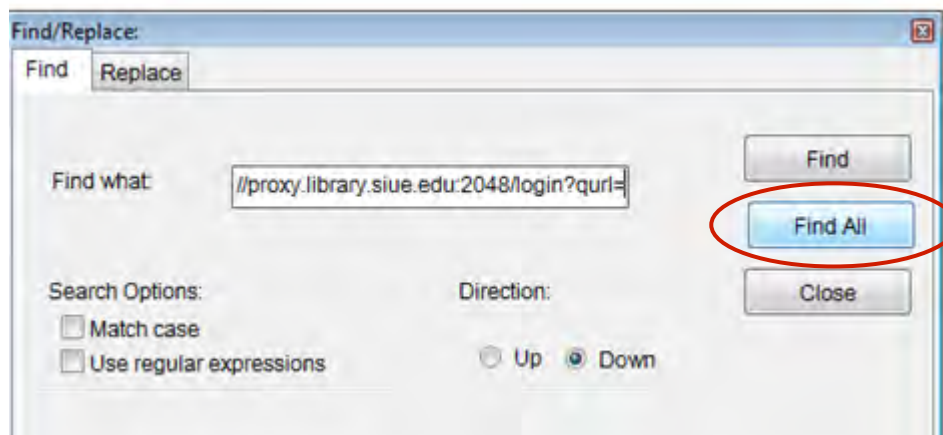
6. The "Find all results" will then outline the total number of times the proxy was found and a more detailed list of its location. In this example, you can see that you will be editing 85 instances of the URL proxy.
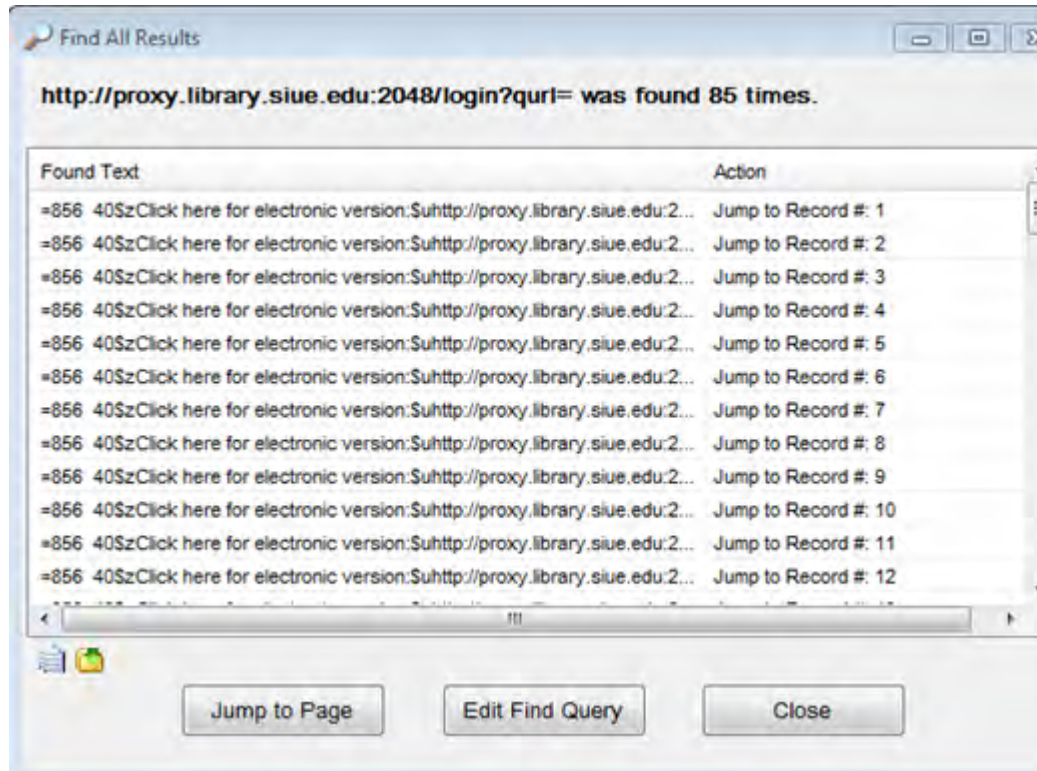
7. Now that you have your batch of records open in MarcEdit, identify the proxy URL that you would like to change and the new proxy. In this case:
   a. Old proxy: http://proxy.library.siue.edu:2048/login?qurl=
   b. New proxy: http://proxy.library.awesome.edu:2016/login?qurl=

8. Go to "Tools" and select "Edit Field Data."
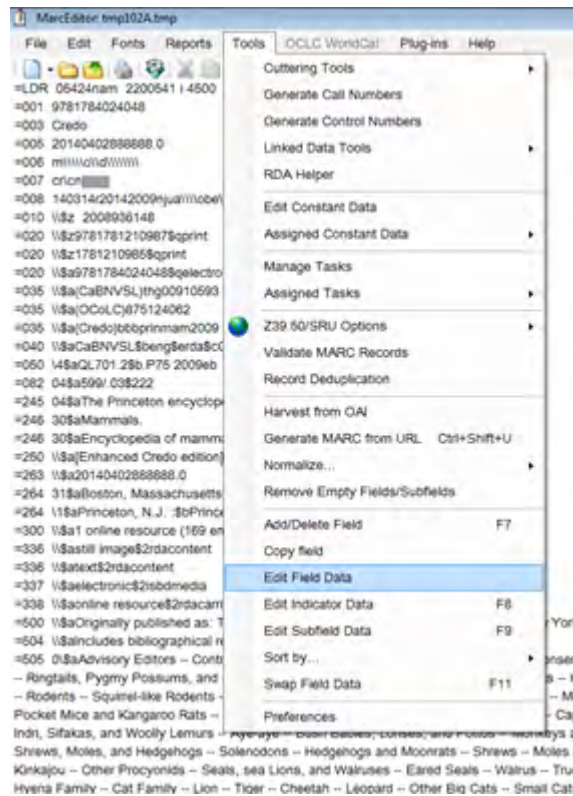
9. In the Edit Field Data pop-up box, select the 856 in the "Field" option. Then copy and paste your old proxy into "Find" and the new proxy into "Replace."
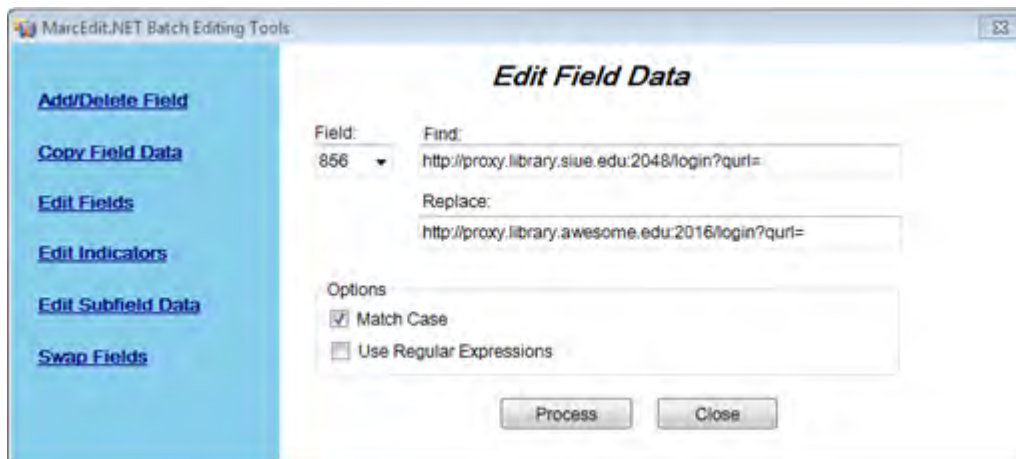
10. Select "Process". A pop-up window will appear, indicating the number of modifications that have been made. You can compare this number with the number of records generated in step 6 as a double check.
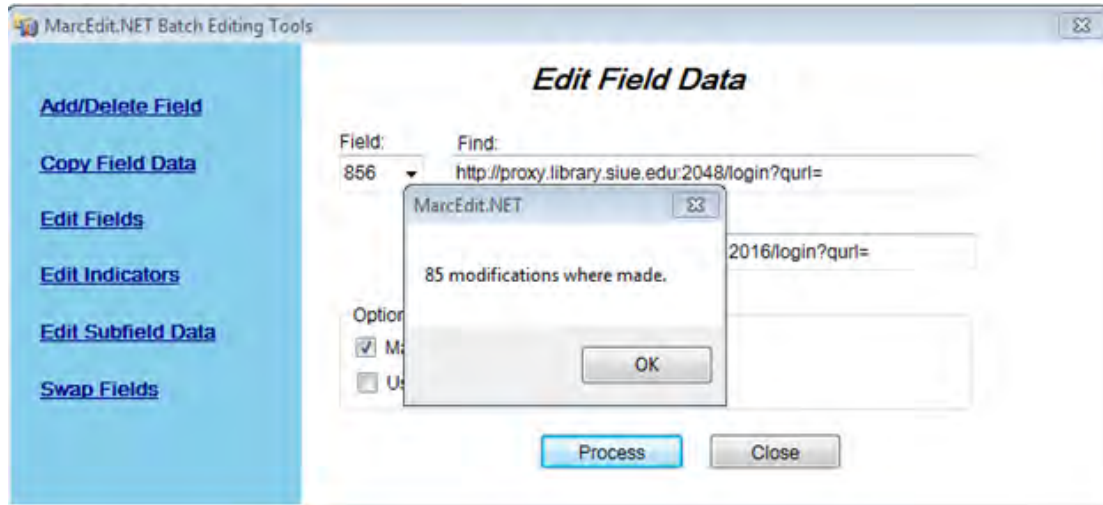
11. Once you have looked over and are satisfied with your edited records, go to "File" and click "Save as" and name your new batch of records. In this case, it will be named "CredoBatch1". If you will notice, the edited MARC file is in the "Save as type" which is a MARC Text File (.mrk). In order to add this batch of records into the catalog, they need to be converted back to the .mrc format. Luckily, MarcEdit does this quickly and easily.
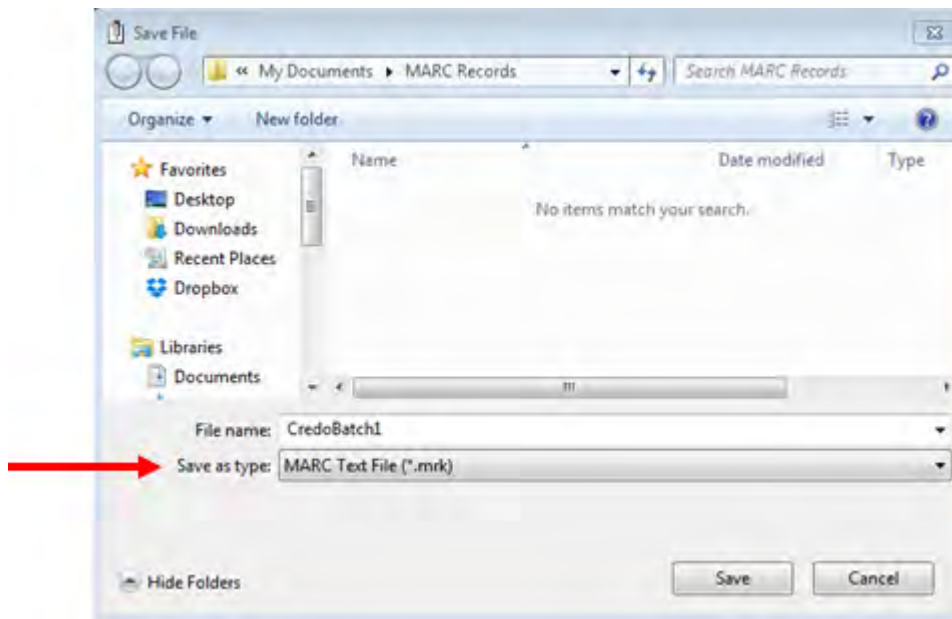
12. Once you have saved your edited batch of records, close out of the MarcEditor. You will now be at the main menu. Select "MARC Tools."

13. In the MARC Tools Menu, select the "MarcMaker" option.
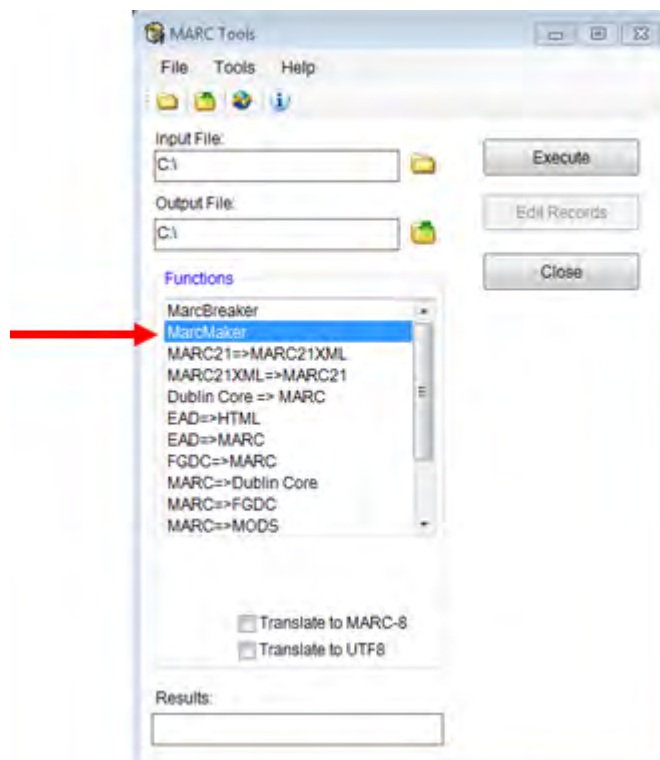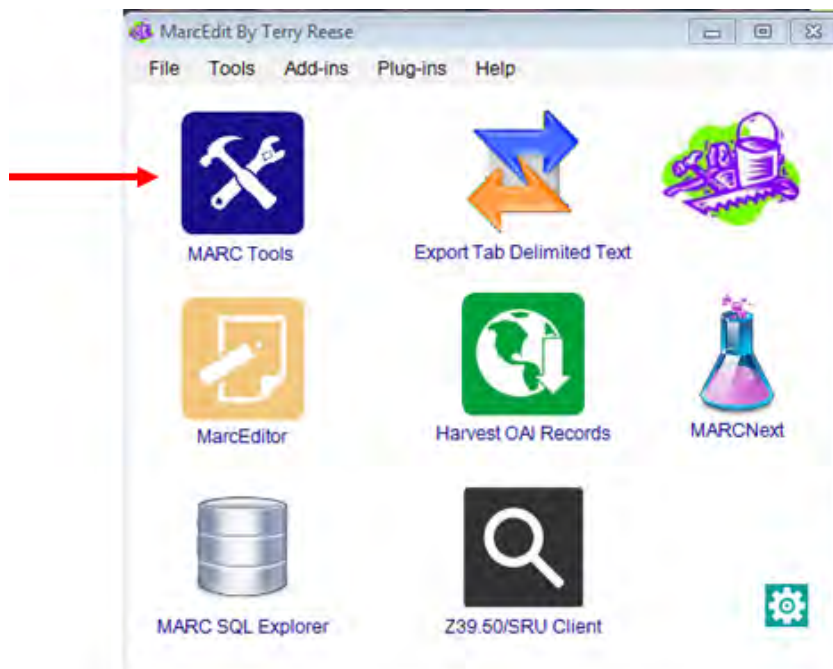
14. For the "Input File" select the file icon to the right of the text box.
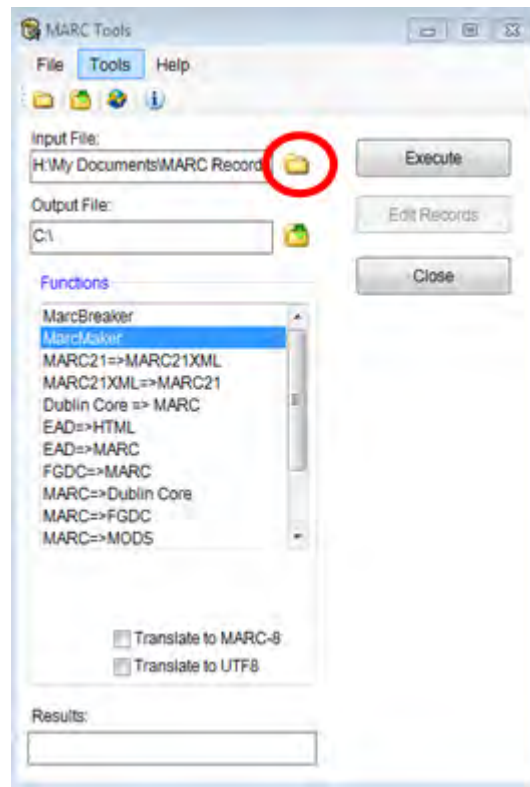
15. Select your edited batch of records and click "Open". In this case, that is the "CredoBatch1" created in step 11.
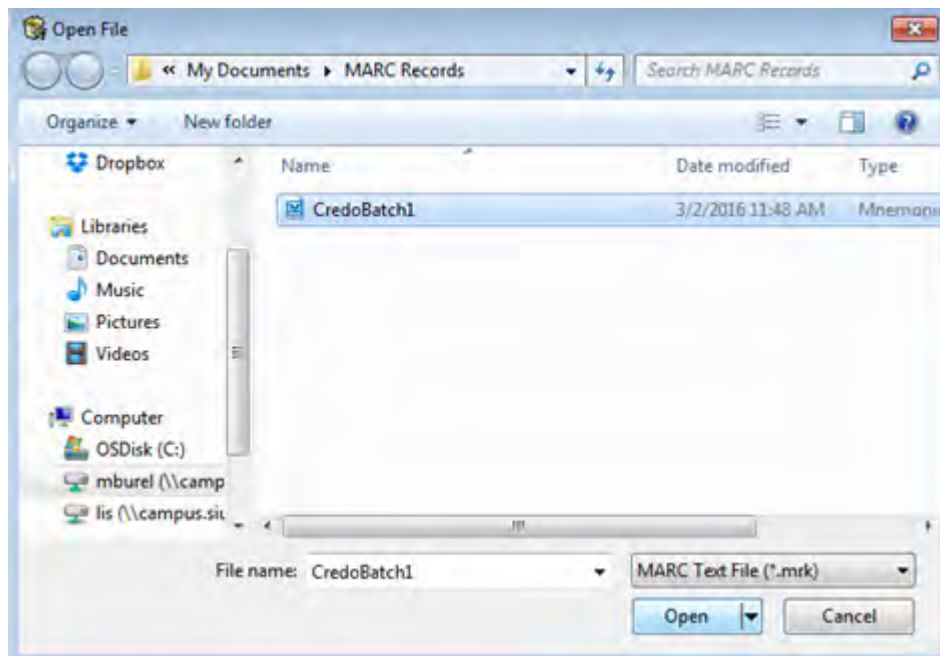
16. Next, select the file icon next to the "Output File." In this step, you need to name your new file. If you notice in this save file pop-up window, the "Save as type" is the MARC files (.mrc), which is the format needed to load records into Voyager. Once you have named your new file and selected its location, click "Save."
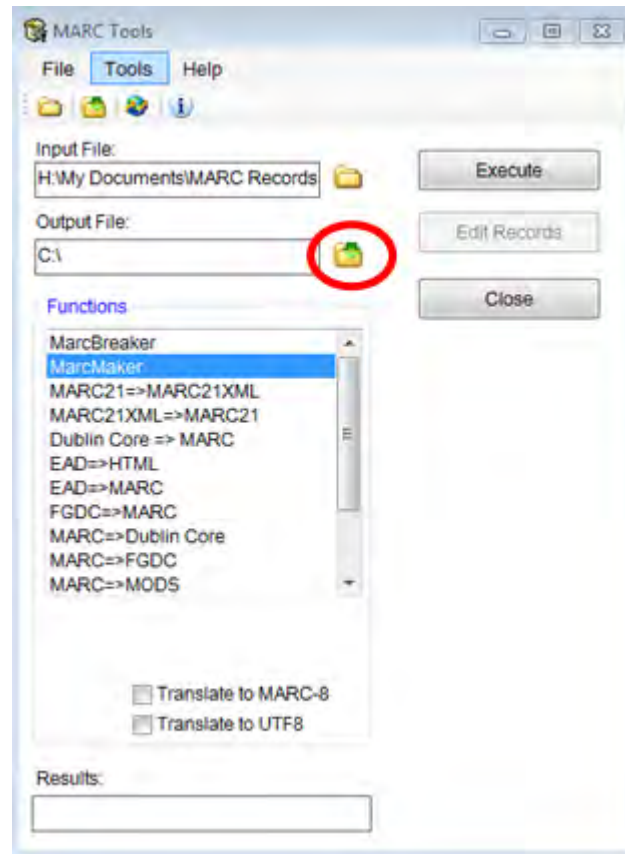
17. Now you are ready to convert your batch of files to the MARC Files (.mrc) format. Click "Execute". Once you have done this, the "Results" text box at the bottom of the page will show the number of records processed.
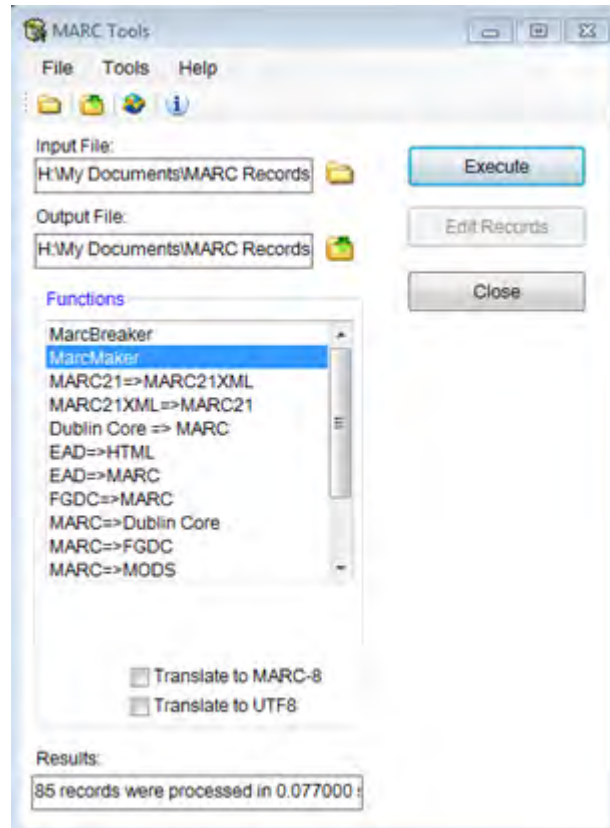

18. You should then be able to find your saved batch of edited MARC files (.mrc) records to be loaded into your catalog.

Part IIIb. USING MARCEDIT TO MAKE AN RDA-MANDATED CHANGE TO AN AUTHORIZED ACCESS POINT

This search will correct a change that was mandated by RDA: changing "ca." to "approximately" in an authorized access point. If you know of a specific access point that needs to be changed, you could edit all instances of it directly, one by one, in the cataloging client; or you could use the "Batch correction request" feature of Gary Strawn's Cataloger's Toolkit.

However, you most likely do not know which access points need to be changed. A way to find and edit all the access points in one operation is to submit an Ad Hoc WRO to CARLI requesting all records with 100, 600, and 700 MARC fields that contain "ca." in $d. When you receive a file of these records, you can then use the MARC Editor function to find all instances of "ca." and convert them to "approximately."

1. Retrieve the MARC files from the CARLI ftp server, and copy them at a location where you can find them. Open MarcEdit and select Marc Tools. Under "Input File" find the file of MARC records from CARLI. Make sure the file suffix is ".mrc." This indicates it is a standard MARC file. Under "Output File" copy over the file name and make sure the file suffix is ".mrk." This indicates a "broken" MARC file that you can read. Make sure "MarcBreaker" is highlighted, then click "Execute" to create the broken file.
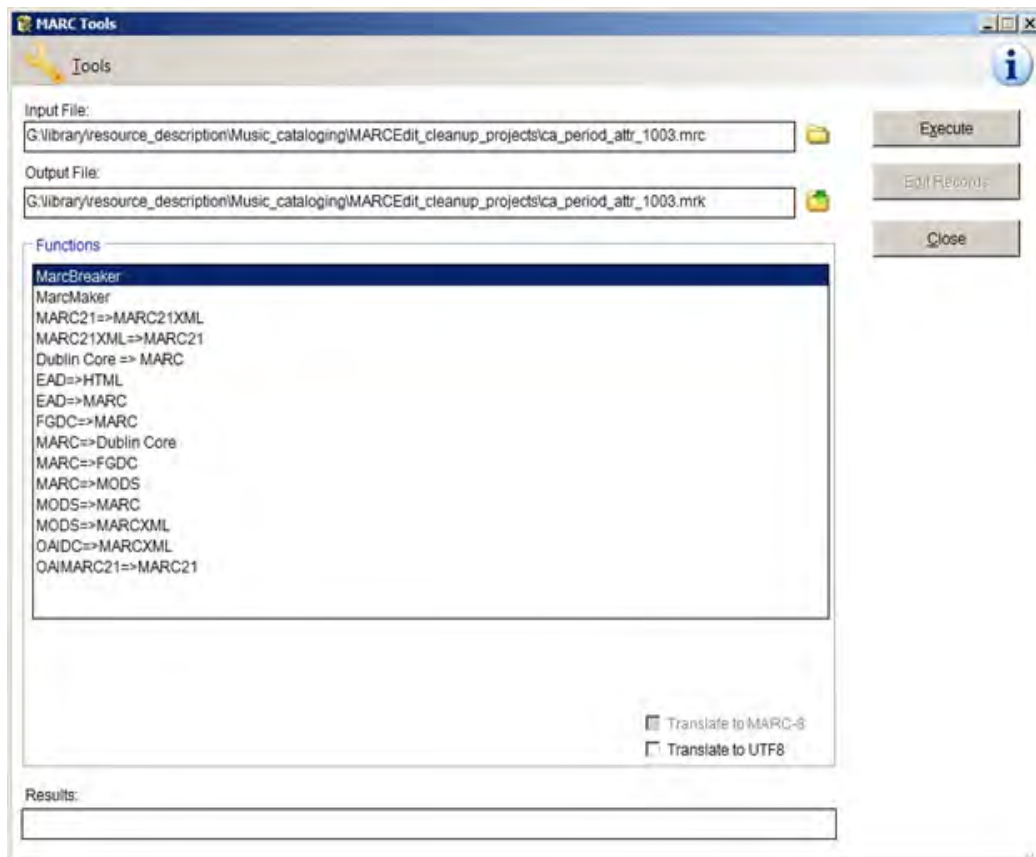

Alternately, you can double click on the file of MARC records, and MarcEdit will bring up the MARC Tools window with the file names already filled in. Then click "Execute."

2. Next, you need to open the broken file in the MarcEditor. To do this, select "MarcEditor" from the main menu, choose File > Open or Ctrl-O, then find and open the broken file.

It is helpful before editing to scan the contents of the file for instances of the text you want to change. To do this, choose Edit > Find or Ctrl-F, enter the text to search, then choose "Find all":
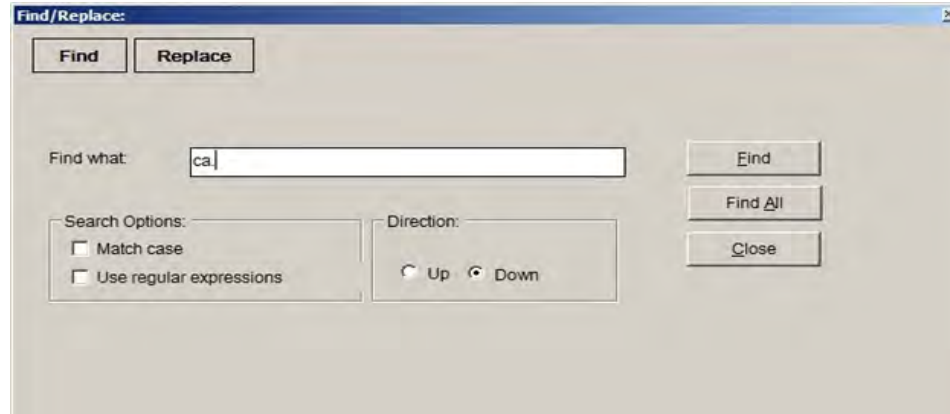
In this example, in addition to dates such as "ca. 1535-1582" there are also such dates as "b. ca. 1777." To avoid inadvertent replacement errors, we may want to directly edit authorized access points like that one in the Voyager cataloging client, and then have CARLI re-do the search.
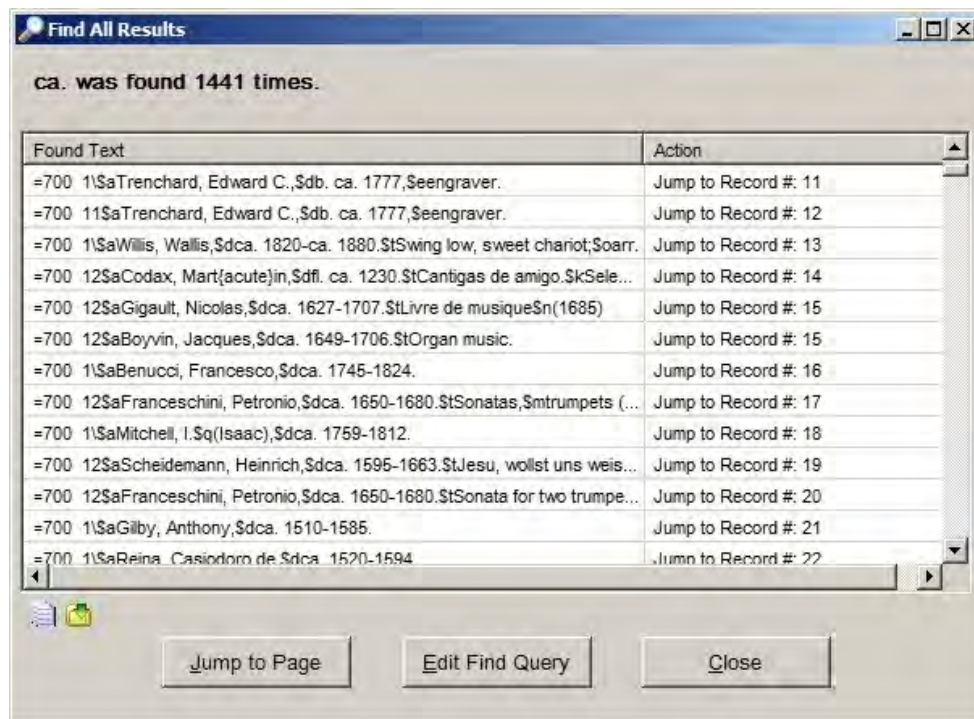

3. Once you are sure that a direct replacement of your text will work correctly, make the change by using the "Edit Subfield Data" function: Tools > Edit Subfield Data or <F9>. Enter the data to be changed in "Field Data" and the replacement text in "Replace with" and choose "Replace text."
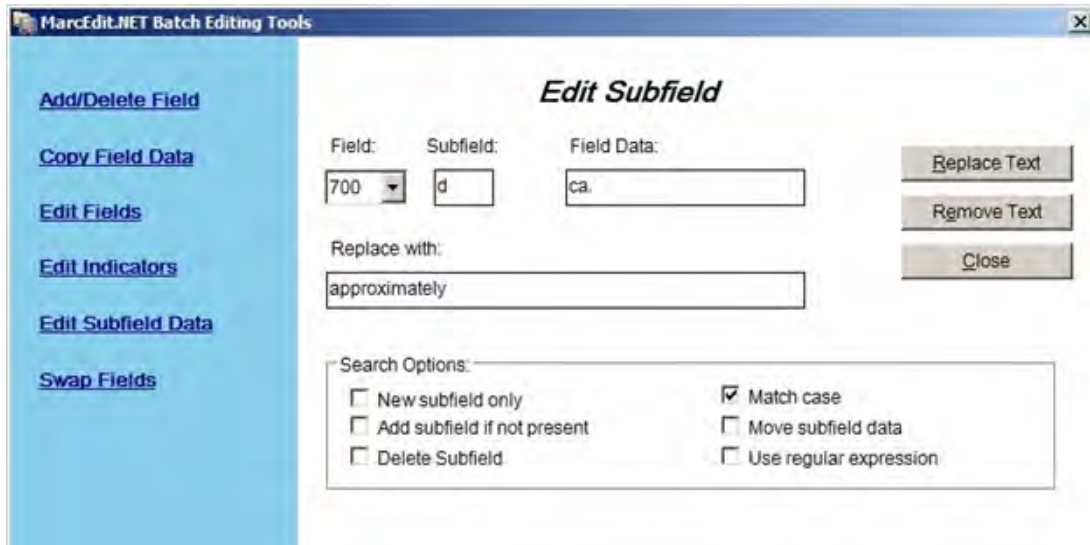
If you want to replace a more complex pattern, and if you can get help in devising a regular expression for your replacement, enter those regexes in the two boxes, and check the box by "Use regular expressions." In this example, you will need to repeat this process for fields 100 and 600.

It is important to analyze where in a field or subfield the data you want to replace will appear. In this case, "ca." is meaningful only in dates, so we can limit the replacement to $d. If the text you want to replace could appear in more subfields, you may want to choose the "Edit Field Data" function:
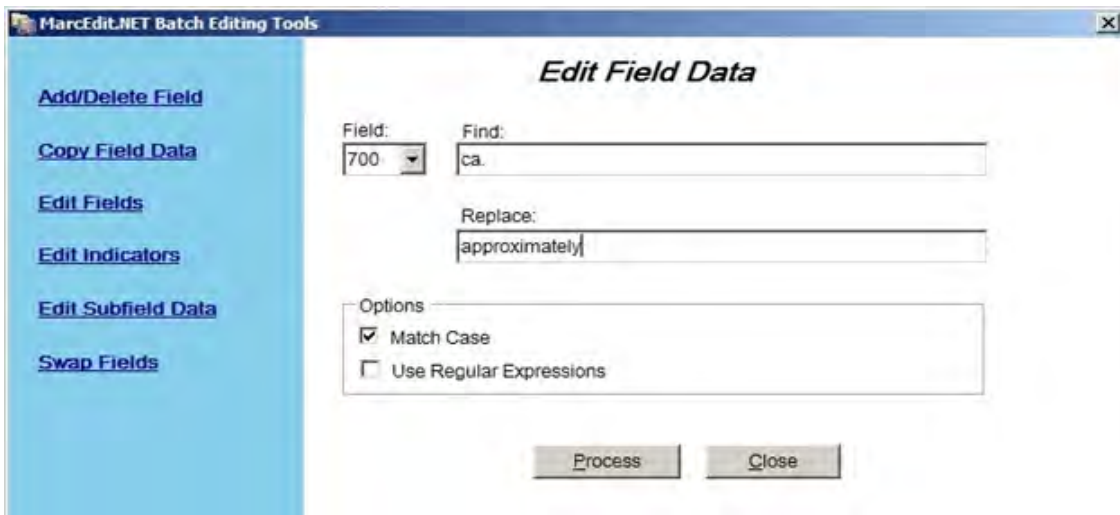
This will replace the specified data in any part of the field. In this example, replacing "ca." with "approximately" anywhere in a 700 field would likely cause errors; for instance, the authorized access point "Smith, Monica." would be changed to "Smith, Moniapproximately." Limiting the edit to the appropriate subfield will avoid errors such as these.

4. You can "Find all" again and look to see if the replacements you made are correct. If you find errors, you can always close the files and not save the changes, and devise a different search and replacement strategy.

5. When you are sure that the replacements you made are what you want, save the .mrk file: File-->Save, or Ctrl-S.

6. The next step is to convert the edited broken file back into a regular MARC file. Open MarcEdit and select Marc Tools. Under "Input File" find the broken file you edited. Make sure the file suffix is ".mrk." Under "Output File" copy over the file name and make sure the file suffix is ".mrc." Make sure "MarcMaker" is highlighted, then choose "Execute" to create the regular MARC file.
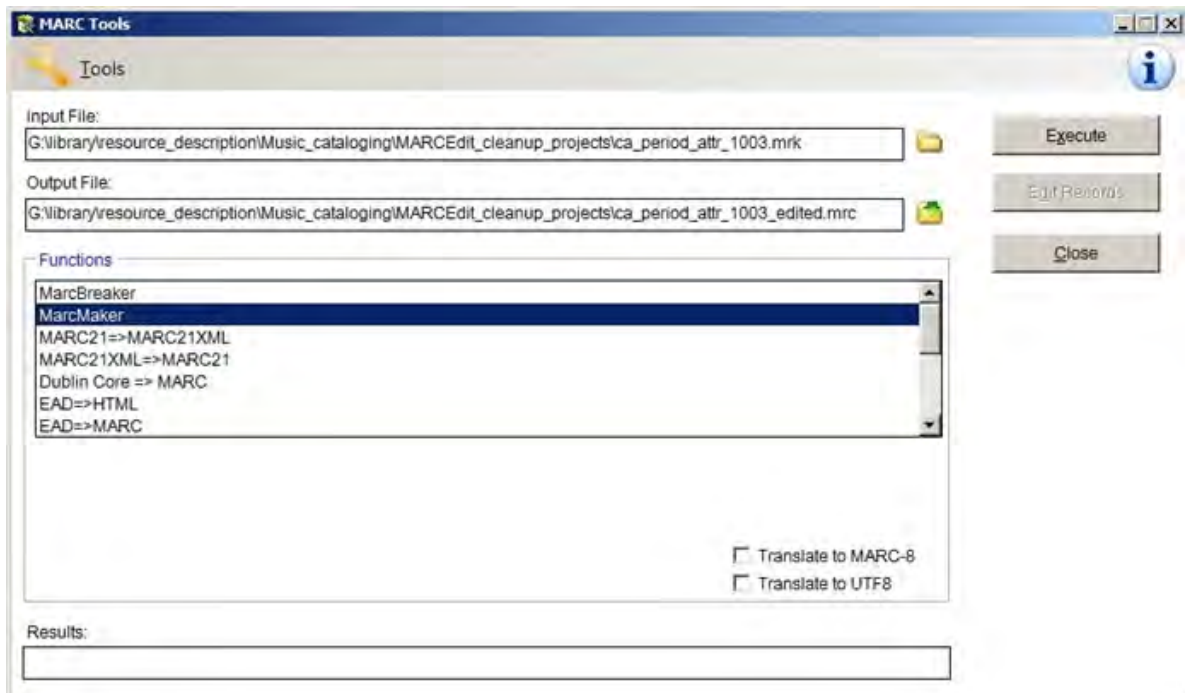
It is a good practice to rename the new .mrc file, in order to avoid confusion about the status of the contents.

7. The last step is to submit the edited .mrc file to CARLI. Usually you need to place it the CARLI ftp server, and notify CARLI support that the edited file is ready to be loaded.

IV. PROJECTS WELL-SUITED FOR MARCEDIT

1. Adding a new MARC field to a batch of bibliographic records, such as a locally-relevant title added entry, local subject, or bibliography note:
   a. 740 0\$a Department of Special Education test kits. $5 INS
   b. 690 \\$a Illinois State University $v Department of Special Education test kits.
   c. 590 \\$a Nacke-Savoie Collection.
   d. 504 \\$a Includes bibliographical references and abstract.

2. Adding a new subfield to a batch of bibliographic records, such as a public note about location or access:
   a. 856 40 $3 Taylor & Francis Online $u http://libproxy.lib.ilstu.edu/login?url=http://www.tandfonline.com/loi/wccq20 $z Available on ISU campus or via ISU ULID

3. Replacing a text string in a portion of a subfield with another text string in the same subfield
   a. For example, replace your institution's former proxy string with its current one within the 856 $u

4. Replacing the text in one subfield with new text
   a. For example replace 700 $e "advisor" in ProQuest MARC records for dissertations and theses with the the RDA relator term "degree supervisor"

5. Copying the text in one field (710) to another field (690)

6. Building a new field from one or more other existing fields, for example build a URL by adding the content of the 001 field to a base domain name, i.e., https://mylibrary.edu/resolver/{001}

7. Deleting all fields with a particular MARC tag completely (791 in ProQuest MARC records for theses or dissertations)

8. Deleting all fields with a particular MARC tag *only if* they start with a particular character string, such as the field containing the ProQuest institution code in records for theses and dissertations
   a. 790 \\$a 0092

9. Changing indicator values for a particular MARC tag

10. Applying constant data

11. Record deduplication

12. Validating authorized access points (1xx/7xx or 6xx). This function searches a batch of records for unauthorized access points and suggests the authorized alternative. (See http://blog.reeset.net/archives/1775.)

13. The RDA Helper feature (available from MarcEdit > Tools or MarcEditor > Tools) also supports the expansion of abbreviations, offering a list from which you can select any or all; the addition of the 336, 337, and 338 fields; among others.

Part V. FURTHER READING AND STUDY

Web Resources

The following are helpful resources for learning more about using MarcEdit:

MarcEdit Development - http://marcedit.reeset.net/

> A good place to get started. Includes MarcEdit software downloads, recent posts from Terry's Worklog, technical information, webinars, and other instructive information.

MarcEdit LibGuide (University of Illinois) - http://guides.library.illinois.edu/MarcEdit

> Detailed user guide for MarcEdit, including screenshots and information about some of the non-MARC features of MarcEdit, including the OAI harvester and linked data tool.

MarcEdit Listserv - https://listserv.gmu.edu/cgi-bin/wa?A0=marcedit-l

> Sign up to join this discussion list for users of MarcEdit, which is great for getting project-specific advice and learning about how others are using MarcEdit. Terry Reese is a regular contributor.

MarcEdit resources (CARLI) - https://www.carli.illinois.edu/products-services/i-share/cat/secure/marcedit-resources

> A collection of MarcEdit resources on CARLI's website. Includes a five-part webinar series given by Terry Reese for CARLI in 2015 and materials from other MarcEdit programs and workshops.

MarcEdit YouTube channel -
https://www.youtube.com/playlist?list=PLrHRsJ91nVFScJLS91SWR5awtFfpewMWg

> Video demonstrations from Terry Reese of the various features and functions of MarcEdit. The next best thing to hands-on learning when you're not quite sure how to get started.

RegExr - http://regexr.com/

> Interactive resource for learning about and testing regular expressions, which can be used in MarcEdit.

Terry's Worklog - http://blog.reeset.net/

> Maintained by Terry Reese, creator of MarcEdit. Includes new regarding MarcEdit updates, explanations of new or overlooked MarcEdit functions, and lots of other helpful discussion.

Journals

The following journals can be consulted for articles describing uses for MarcEdit:
- *Computers in Libraries*
- *Code4Lib Journal*
- *Journal of Library Metadata*
- *Library Resources and Technical Services*
- *Technical Services Quarterly*

Other

If all else fails, try Google! There are lots of helpful presentations and training documents out there to explore.