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2017–2018 CARLI Collection Management Committee
Annual Report of Activities

Committee Membership

Deborah Blecic (2015-2018), University of Illinois at Chicago, Co-Chair
Daniel Blewett (2017-2020), College of DuPage
Chad Buckley (2017-2020), Illinois State University
Theresa Embrey (2016-2018), Pritzker Military Museum & Library
Connie James-Jenkin (2016-2019), Illinois Mathematics and Science Academy
Niamh McGuigan (2015-2018), Loyola University Chicago
Michelle Oh (2017-2019), Northeastern Illinois University
Gretchen Schneider (2016-2020), Oakton Community College, Co-Chair
Kimberly Shotick (2016-2019), Illinois Institute of Technology
CARLI Staff Liaisons: Elizabeth Clarage and Jennifer Masciadrelli

Meetings

The committee met monthly, with 1 in-person meeting at the College of DuPage. The other meetings were conducted via conference call.

Presentations

- ILA Annual Conference, October 12, 2017: "Collaborative Collection Development: Growing Collections in Times of Austerity", presented by Jennifer Masciadrelli, CARLI; Niamh McGuigan, Loyola University Chicago; Gretchen Schneider, Oakton Community College; and Kimberly Shotick, Illinois Institute of Technology .
- CARLI Annual Meeting, November 17, 2017: 2016-2017 “Project Overview: Collaborative Collection Development”, presented by Deborah Blecic, University of Illinois at Chicago and Gretchen Schneider, Oakton Community College.

Accomplishments

- Reviewed and updated the CARLI Scholarly Communications website in fall 2017.
- Coordinated consortia-wide e-book purchasing among member libraries. For a multiplier, e-book is available to all CARLI members.
- Coordinated collaborative collection development across a subset of CARLI membership in the areas of Education and Print One-Time Purchases in any subject.
- Surveyed member libraries about their practices regarding cataloging open access e-books, what records members would be interested in adding to I-Share, and asking for volunteers to work on a collaborative project in this area in the future.

Future Plans

- Review and update the CARLI Scholarly Communication website in Fall 2018.
- Continue consortia-wide e-book purchasing if license renewal is successful.
- Continue Education Collaboration.
- Continue Open-Access E-book Project

2017–2018 CARLI Collection Management Committee Annual Project: Collaborative Collection Development Continued and Expanded

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Introduction and Background

The Collection Management Committee continued various projects that began in FY16 (education and one-time purchase collaborations) and FY17 (consortial purchase of eBooks restarted). The committee also started a new project to collaborate on open access eBook selection and cataloging for I-Share. All of the projects have the goal of enhancing the statewide collection of books. In working through various projects, the committee tried to further delineate best practices that began to emerge last year.

Collaboration projects were started in FY16 in response to declining book budgets, declining I-Share borrowing, and the perceptions that libraries were buying fewer unique items for a variety of reasons and/or buying more eBooks that could not be shared among consortium members. The overarching goal of the committee's work was to increase the number of unique print books and eBooks that could be shared with all members, as well as to tap into the growing number of open access eBooks that are available but need to be found and cataloged.

The committee's annual projects for FY16 and FY17 contain extensive documentation on the state of book buying and a review of literature on collaboration. Rather than repeat this supporting documentation, we offer links to the reports: https://www.carli.illinois.edu/sites/files/files/2016CollectionsMgmtCommCollaborative_Collections.pdf and https://www.carli.illinois.edu/sites/files/files/CMC_2017Project.pdf .

Continuing Projects

Education

The education collaborative collection development project focuses on purchasing print K-12 textbooks being used in Illinois school districts around the state. In 2017, 6 institutions participated in this initiative, purchasing an estimated $10,389 worth of materials. This year, 2018, 5 institutions participated by purchasing an estimated $10,779 worth of materials. Despite lower participation, there was a moderate increase in financial commitment to the project.

K-12 textbooks are unique in that they can often be prohibitively expensive to purchase and challenging to share. For example, a set purchased in 2018 titled "Being a Reader" was estimated at $5000. These materials also have many parts, including teacher resources and student manuals that often need to be used together. The costs, however, make these materials desirable for consortial sharing.

The title list for selection was gathered by reaching out to over 20 different school districts across the state with emphasis on districts near I-Share institutions with teacher education programs. The response rate was low, but some school districts identified their materials on websites. As districts generally adopt textbooks and curricula for a number of years, it does not seem worthwhile to reach out to the same districts in the next year as these titles will likely be the same. Rather, continuing efforts will focus on promoting the purchased materials to all CARLI member libraries, as the circulation statistics seen below are modest. Also, an effort will be made to get purchase commitments for those items not yet purchased. The list of title identified along with the purchasing CARLI members can be found here: CARLI K-12 Textbooks (https://docs.google.com/spreadsheets/d/1myv9722Qj7YDXyBZAQxq1wywwtbTSjdyPagCvjo45w8/edit?usp=sharing.)

Staff at the CARLI Office verified the item types assigned to these collections are ones that are generally requestable by students in I-Share libraries. Most items are assigned the “UBreg” item type, indicating that they are requestable, although some follow up was needed to ensure that collaborating libraries were using the correct code.

Circulation Statistics

Year	Circulated	Browse
2017	4	8
2018	1*	

*note: most 2018 items have not been processed yet

One Time Purchases

A goal of CARLI’s Collection Management Committee (CMC) is to pursue ways in which CARLI members can work together to enhance the statewide collection. Due to budget issues, the committee members suspected that member libraries had not been able to purchase all the print books they would have liked. As a result, CMC began the one time purchase project during FY17 and continued it during FY18. During both years, CARLI librarians were invited to purchase titles unique to the I-Share catalog and record the purchases on a Google Drive spreadsheet.

Announcements and requests for participation were sent out in CARLI newsletters and it was announced at the CARLI Annual Meeting.

The one time purchase project's goal was to have every CARLI library purchase two or more unique print titles which are not owned by I-Share Libraries at least six months after their publication date. The committee believed that after six months most titles that would have been purchased and would have been added to OCLC and I-Share.

Some CARLI libraries expressed concern that this project would encourage the purchase of titles of low or limited value. This was not the committee’s intention. The committee felt strongly that if every CARLI member could purchase a few titles not held in our consortium, our joint collection will be richer.

During FY17, 11 different CARLI librarians purchased 164 titles for the project. As of March 2018, 77 of the titles remain unique in the I-Share catalog.

Usage Statistics for 77 Remaining Unique Titles

Charges	Browses
17	69

During FY18, 6 different CARLI librarians purchased 25 titles for the project. As of May 2018, 24 remain unique in the I-Share catalog. Usage statistics are not yet available for these titles.

Titles purchased for the project can be found at the following links:

- FY17 One-Time Purchases (https://docs.google.com/spreadsheets/d/1CaHUvl1HKJ9OYuFyf6eegNIqRmYuUirl9ge__Rv9FGM/edit?usp=sharing)
- FY18 One-Time Purchases (https://docs.google.com/spreadsheets/d/12OPrKHDb6VfNlc2Vy9oxlQIUbxksXTr-6ABF-Xsdekk/edit?usp=sharing)

Due to the large drop-off in participation during FY18, the CMC has decided to discontinue the formal one time/unique purchase project. However, the committee still sees significant value in encouraging CARLI members to continue to seek unique purchases. The CMC encourages selectors to remain cognizant of the larger CARLI collection when making selection choices and actively seek unique titles to add to their local collections.

Consortial eBook Purchases

This project asked CARLI member libraries to purchase two eBooks at price that included a multiplier negotiated by CARLI. By paying the multiplier, the books were available to all CARLI members. During this past fiscal year, 39 CARLI members purchased 105 eBooks on behalf of the consortium.

The project was announced to the membership in January 2018. There were two additional messages included in the CARLI newsletter and sent to email lists with final messages sent one month and ten days prior to the end of the project. Purchases in the last month/ten days warrant this approach again if the project is continued in the future.

The Collection Management Committee reviewed the project procedures that were used during the previous year, 2016-2017. Due to the high number of eBooks that members wanted to purchase but ultimately were not available for consortial purchase, the Committee redesigned the participation process for 2017-2018.

CARLI staff reached out to our eBook vendor and requested a list of titles published after 2014 that were available for consortial purchase. This title list was then compared to I-Share and divided into:

- No Copies in I-Share (~3,100 titles)
- No Print Copies in I-Share (~4,300 titles) (there was some concern about the accuracy of this metric so it will be double checked if the project is repeated)
- Complete list of titles available with I-Share inventory counts (~16,500)

A spreadsheet (https://docs.google.com/spreadsheets/d/1S2KuGO1oNJSoT_aqohkKJmbbU2pPeFh_iNF_oGSP9eo/edit?usp=sharing) was then shared with members for selection purposes. Of the 112 titles that members wished to purchase, 7 were not purchased (6% not purchased). Reasons for not purchasing:

1 title: another library had already purchased
1 title: price increase
2 titles: titles were requested prior to the new process was in place and the titles were not available for purchase
3 titles: library declined to purchase due to book format (workbook or juvenile material)

This contrasts with the statistics from the previous year, when 27 CARLI members identified 89 titles to purchase, of which only 29 were completed purchases (67% not purchased). The main reason that titles were not purchased then was that they were not available for consortial purchase.

Consortial eBook Usage from date of Purchase through 5/30/2018:

	2016 - 2017 Purchased Titles (Purchased 2017: 1/1 - 6/30)	2017-2018 Purchased Titles (Purchased 7/1/17 - 5/24/2018)
Number of Titles	29	105
Number of Browses	270	165
Number of Loans	326	192
Money Spent	$7,776.80	$23,198.80

All titles purchased in the preceding year have had use. For the titles purchased this year, 39 did not yet have use; however, 53 of the 105 titles were purchased in April and May.

Open Access eBook Project - Phase One

The open access eBook project evolved from conversations that were initially held about collaboration in literature, as CARLI members had concerns that they were not finding and using all open access literature books available. The Collection Management Committee expanded the focus to open access eBooks in all subject areas.

In the February CARLI News, the Collection Management Committee sent out an Open Access eBooks Survey. It stated:

> "The CMC is exploring the availability of Open Access eBooks and their corresponding cataloging records. In this context, Open Access eBooks refers to academic monographs that are made freely available for use and distribution online.
>
> What Open Access eBooks would member libraries like to see available to all libraries using I-Share and eventually through OCLC Collection Manager to all CARLI members?
>
> Even if your institution does not currently select or add Open Access eBooks to your local catalog, all CARLI members are encouraged to complete the survey ... so there is an accurate representation of the entire consortium.
>
> Thank you for completing this survey to help us understand current practices and interest in this topic within the CARLI membership."

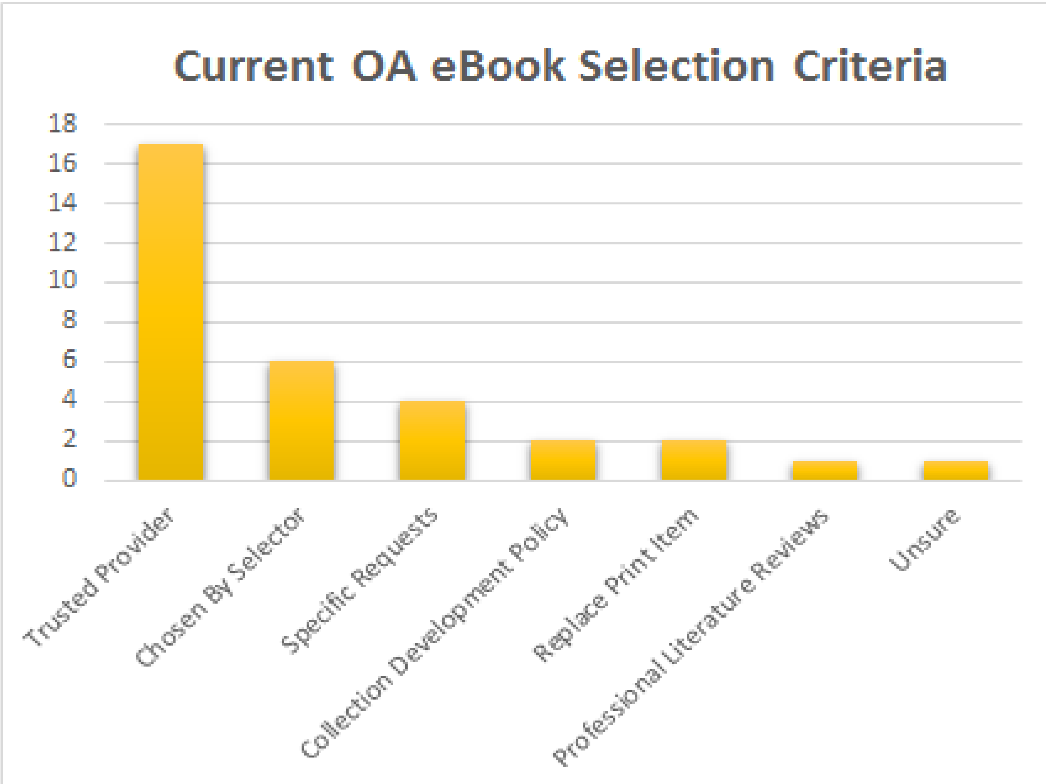
The survey results were as follows:
Number of responses: 77
Number of institutions that responded: 62

The questions from the survey are in italics and we share them and the answers.

Has your library added any Open Access eBook titles to your catalog?

Yes: 35
No: 42

How did you choose which Open Access eBooks to add to your catalog?

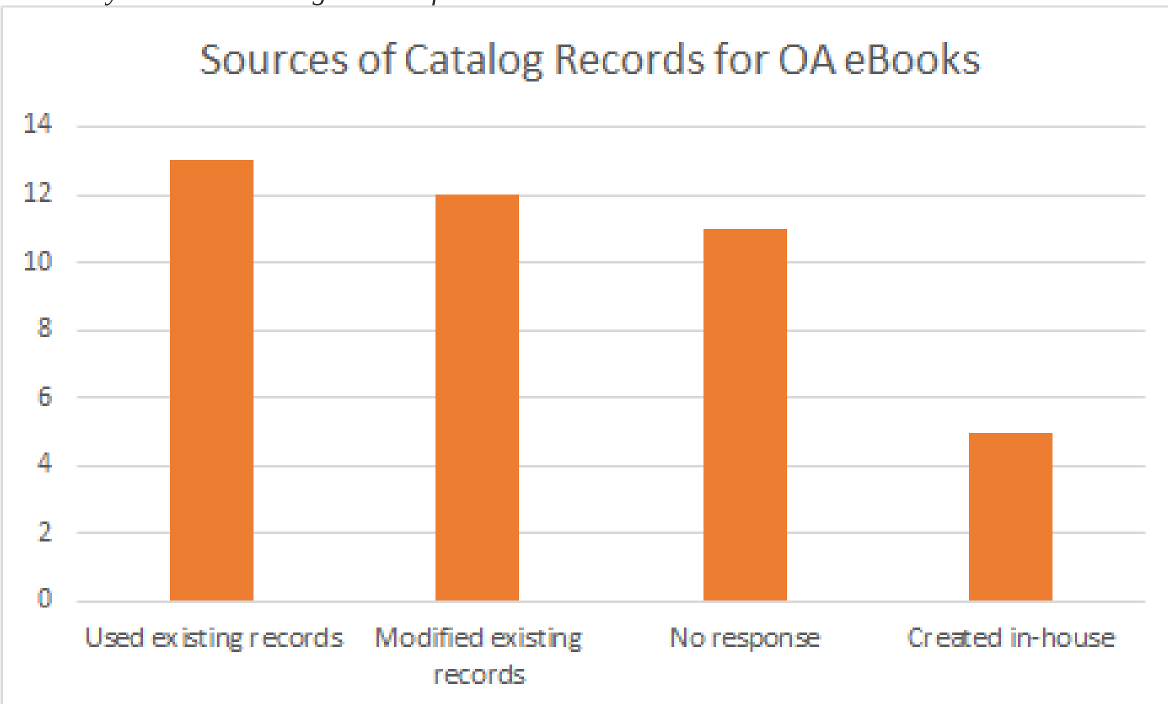


Current Selection Criteria for Open Access eBooks	Responses
Trusted Provider	**17**
Chosen By Selector	**6**
Specific Requests	**4**
Collection Development Policy	**2**
Replace Print Item	**2**
Professional Literature Reviews	**1**
Unsure	**1**

Did you add single Open Access eBook titles or a collection(s)?

Both: 11
Collections: 8
Single titles: 11

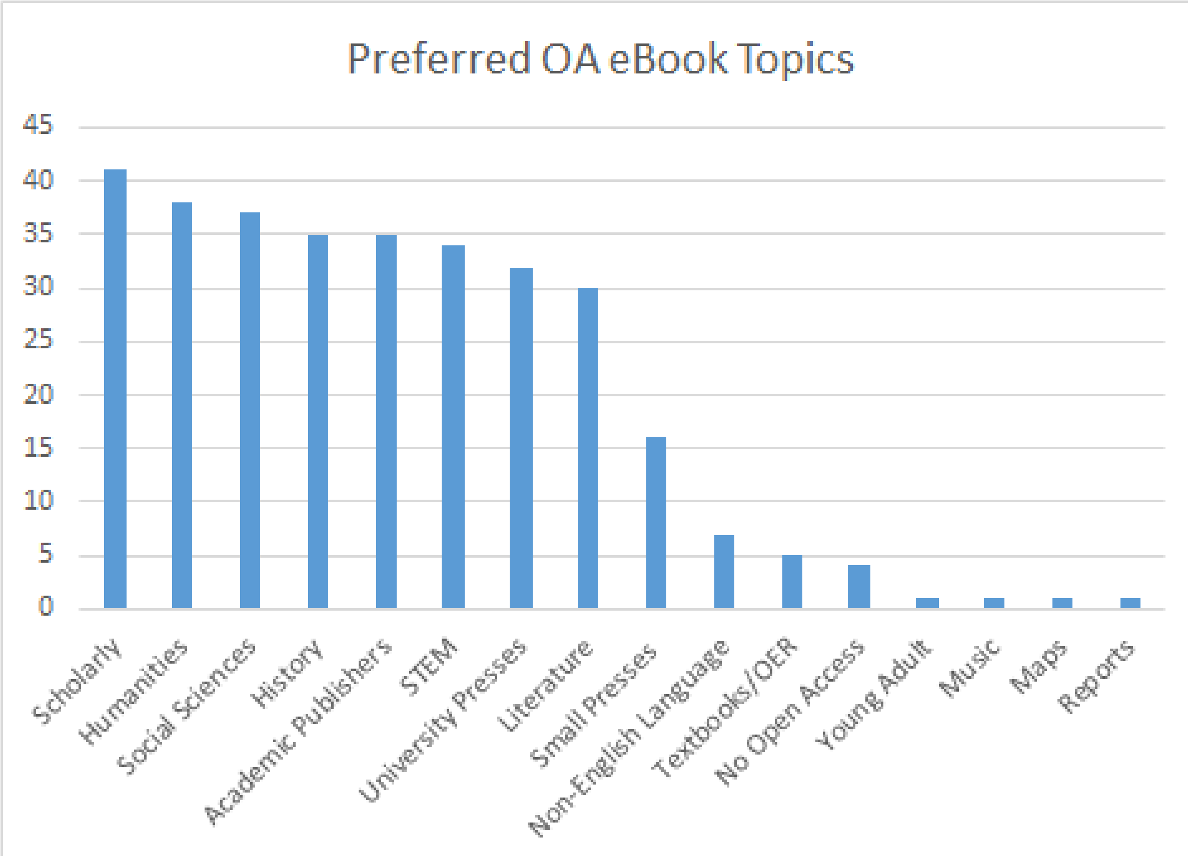
How did you obtain catalog records for these materials?



Sources of Catalog Records Open Access eBooks	Responses
Used existing records	**13**
Modified existing records	**12**
No response	**11**
Created in-house	**5**

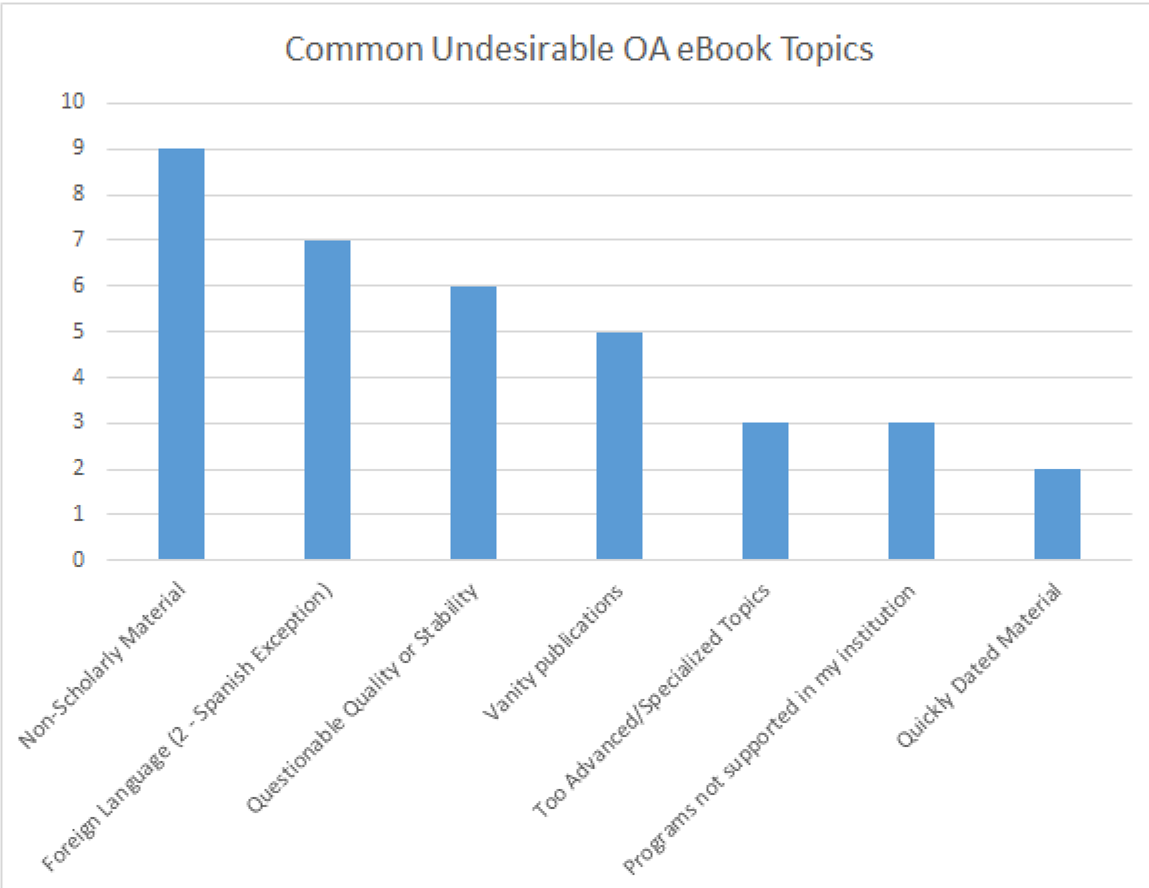
Additional Information on Cataloging	Responses
Obtained records from OCLC	**9**
Obtained records from Serial Solutions	**3**
Records need some improvement (ex. Add TOC)	**2**
Don’t catalog, but make discoverable through a different system	**2**
Modified print records to include link to OA online version	**1**

What type of Open Access eBooks would you like to provide access to through your catalog?



Preferred Open Access eBook Topics	Responses
Scholarly	41
Humanities	38
Social Sciences	37
History	35
Academic Publishers	35
STEM	34
University Presses	32
Literature	30
Small Presses	16
Non-English Language	7
Textbooks/OER	5
No Open Access	4
Young Adult	1
Music	1
Maps	1
Reports	1

*What types of Open Access eBooks would you not want added to the catalog***?**



Common Undesirable Open Access eBook Topics	Responses
Non-Scholarly Material	9
Foreign Language (2 - Spanish Exception)	7
Questionable Quality or Stability	6
Vanity publications	5
Too Advanced/Specialized Topics	3
Programs not supported in my institution	3
Quickly Dated Material	2

Any other comments?

- There is a need for a centralized system for evaluating, selecting, and cataloging OA eBooks (3 responses).
- Staff limitations have prevented libraries from cataloging OA eBooks (2 responses).
- OA eBook collections tend to be too specialized (2 responses).
- Interest shown for open textbooks (2 responses).

- Interest shown for other OA content in addition to eBooks (2 responses).
- There is a need for advanced search filters to aid discovery.
- Users are interested in eBooks that have no DRM limitations on use.
- There is a preference for a small, highly curated collection.
- There is a preference for adding OA eBooks to the discovery layer rather than the local catalog.

Are you interested in contributing to a collaborative project on Open Access eBooks?

Yes: 38
No: 22
No response: 19

In response to the survey, the committee developed guidelines for a possible Open Access eBook Collection Pilot Project in 2019. The goal of this project is to test procedures for adding records for scholarly and stable Open Access eBooks to the I-Share catalog. The steps laid out in these guidelines will enable CARLI to create a central repository of Open Access eBook records, managed and maintained by CARLI staff and committees.

This is a pilot phase focusing on open access eBooks that have records available in OCLC Worldshare Collection Manager Knowledge Base. Following a pilot phase, this policy may be updated to include a broader range of open access materials. In future years the CMC should look for ways to encourage member libraries to suggest materials to be added to OA collection, including materials that require original cataloging.

The Committee will review OA collections in OCLC WorldShare Collection Manager Knowledge Base (https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/WorldCat_knowledge_base_data_updates/Collections_available_in_the_WorldCat_knowledge_base) to identify potential collections.

The committee and other volunteers will select materials based on the following criteria:

- The collection/provider is listed in a recognized directory of Open Access content, such as the Directory of Open Access Books.
- Materials are peer-reviewed or appropriately scholarly.
- Materials are released under an Open Access License.
- Materials have a stable URL.
- Materials are archived in a secure digital repository.
- There are no significant limitations to the readability or navigability of materials.

Desirable Materials:

- English language
- Academic or University publishers
- Content appropriate for a broad academic audience
- Content that will not become dated
- Current academic monographs (as opposed to digitized historical collections)

Undesirable Materials:

- Non-English language material (with potential exceptions for Spanish language material)
- Books that are self-published
- Books that are highly specialized
- Material available in another collection that is widely available to CARLI members
- Digitized historical collections

CARLI Staff will be responsible for adding and updating records in I-SHARE. The collection should be updated twice a year based on committee recommendations communicated to CARLI. For cataloging in I-Share, the following is proposed:

- **Collection name**: CARLI Open Access eBook Collection
- **Location name**: CARLI Open Access eBook Collection
- **Facets**: Genre - Open Access eBooks

This collection will be made optional for local catalogs in the same fashion as the Hathi Trust collection.

The Collection Management Committee will review this policy annually and revise when necessary to incorporate changes that reflect member library preferences and developments in Open Access publishing.

Best Practices in Collaborative Collection Development

In 2002 the Center for Research Libraries released a report titled *Best Practices in Cooperative Collection Development.* This report looked at several large-scale successful collaborative projects in order to develop descriptive best practices. The following is a distillation of those best practices in light of the collaborative projects this CARLI committee engaged in.

Determining Readiness

Before beginning a collaborative collection development project, institutions should determine whether or not they are ready to take it on. Collaborations that have been successful had these elements in common before initiating projects:

- History of collaboration
- Administrative support
- Clear goals established
- Funding available

In the case of CARLI, institutions have a long history of collaboration. Although CARLI does not have funding for individual projects (other than the staff time to assist the committee work), in one case administrative support and additional funding lead to greater participation in one of the projects. Each project defined their own goals with the common goal of increasing unique resources to be shared across institutions.

Elements Necessary for Success

Successful collaborative collection development projects had the following elements in common:

- Constant and clear communication with participants. Communication should come from multiple channels, such as direct emails, listservs, newsletters, and in-person communication. Repetitive and regular communication of objectives and procedures is necessary.
- Flexibility to allow for changes in membership, funds, and objectives. This may mean changing procedures and/or objectives as projects develop.
- A feedback mechanism to allow the project to adapt as needed. Along with pushing out communication, leaders should actively seek feedback from participants.
- Assessment of outcomes. Projects should be assessed via methods most appropriate to the particular project. Examples of potential assessment methods include: analysis of circulation data, interviews with participants, and surveys to individuals at collaborating institutions.

Future Directions

Based on the responses from member libraries, there is interest in collaborative collection development in various formats. The challenge for the committee is to construct opportunities to facilitate member participation. The expansion of the eBook project was a successful example of an opportunity that generated response because it was not time-consuming or very costly to participate. For next year, the committee plans the following collaborative collection development projects:

- The OA Project will start the initial phase of selection of OA eBooks to add to the I-Share catalog and consider expanding to non-cataloged and/or non-monograph items in the future.
- Discontinue the formal One-Time Purchase Project, but encourage CARLI member libraries to continue to expand the collection as they can by selecting unique materials by being cognizant of the larger collection when making selection choices.
- Continue the consortial EBook project if the next contract under negotiation allows continued collaborative purchasing at a reasonable price.
- The Education Project will continue, but will focus on outreach with libraries that have made purchases to increase usage.

The Collection Management committee will also look for new opportunities to expand collaborative collection development among member libraries and enhancing the statewide collection.

2017–2018 CARLI Commercial Products Committee: Annual Report of Activities

Membership:
Lesley Wolfgang, St. John's College of Nursing Chair
Xiaotian Chen, Bradley University
Edith List, Principia University
Jeff Matlak, Western Illinois University
Hilary Meyer, Triton College
Jim Millhorn, Northern Illinois University
Kavita Mundle, University of Illinois at Chicago
Heather Parisi, Dominican University
Amanda Wiesenhofer, Lincoln Land Community College

Highlights of Activity:

Electronic Resource Proposal Evaluations

The CPC received 12 proposals in FY18. Of those proposals, six were rejected and the other six are pending.

As an outgrowth of the proposal review the CPC also participated in the creation of an interest survey to assess member libraries levels interest in possible new products. A survey of seven products which had been proposed or were of interest to the committee was launched on 1/23/18. The products included and final results were:

Product	Interested Libraries
Kanopy	59
Films on Demand	58
Bloomsbury	51
Naxos	48
Statista	40
IBISWorld	32
DocuSeek2	28

CARLI will be negotiating with vendors based on this information in hopes that some of the products can be added for FY20.

Open Conference Call on Streaming Video

The committee decided that the focus for FY18 would be working with streaming video resources and vendors. The first activity was hosting an open conference call for CARLI libraries to discuss issues related to working with streaming video. In preparation for the call the committee created a list of questions to be used to get the discussion started. These were:

- Who handles public performance rights on your campus? Is this something the library currently handles or wishes to handle in the future?
- Do teaching faculty have media format preferences (streaming vs. DVD, for example)?
- What streaming video and audio platforms are you currently using?

- What streaming video/audio platforms have you used in the past that you are no longer offering? Why? (cost, usage, accessibility, etc.)
- How do you handle pay-to-play/PDA on your campus? Are you restricting access to certain faculty/courses?
- How do you determine the deposit account cap? How quickly are you using it up?
- What pricing models are you currently using (pay-to-play, restricting usage per patron (hoopla's model), etc.)
- Are you more inclined to purchase or license streaming media? What determines this?
- What media formats are you currently supporting (VHS/CD/DVD/Blu-ray/Cassette/8-track/LP, etc.)
- Are you making an attempt to archive or download owned media? If so, how?
- Have you had difficulties convincing your administration that streaming media is a valuable component of a library collection?
- What are faculty asking for that you are unable to provide?
- Have you had any difficulties with access, for example, with students attempting to watch videos on their phones and/or off-campus?
- Does your streaming media budget come out of your existing media budget or is it impacting other collection areas (books, journals, etc.)?
- Which subject areas/departments are most likely to be using streaming media in their coursework?

The conference call was held on October 27, 2017. At least 20 librarians participated in the call. Discussion was lively and wide ranging and not all of the discussion questions were addressed. The most popular themes discussed were:

- Using Kanopy (14 mentions)
- Using ASP (9 mentions)
- Budget/Cost Issues (7 mentions)
- Assessment/Usage Reporting (6 mentions)
- Other Platforms – not ASP or Kanopy (4 mentions)
- Own Platform (4 mentions)
- Cataloging/Discovery Layer (3 mentions)

Streaming Video Vendor Survey

As their annual project the committee chose to survey the major video vendors to provide CARLI libraries with information to assist them in evaluating and working with streaming video resources. The survey results are attached.

Future Activities

In addition to the annual project, during the year the committee also discussed:

- A survey of libraries related to streaming video that could be foundation for a best practices white paper
- Planning a webinar on scholarly communications issues related to streaming video
- Possible other products for inclusion in CARLI brokering – considering products many of our libraries already subscribe to that could be managed centrally
- A discussion with other CARLI committees of use of the GetItNow service

2017–2018 CARLI Commercial Products Committee Annual Project:
Getting Started with Streaming Media
A Survey of Major Streaming Video Vendors

Members:

Lesley Wolfgang, Saint John's College of Nursing (Chair)
Xiaotian Chen, Brandley University
Edith List, Principia College
Jeffrey Matlak, western Illinois University
Hilary Meyer, Triton College
Jim Millhorn, Northern Illinois University
Kavita Mundle, University of Illinois at Chicago
Heather Parisi, Dominican University
Amanda Wiesenhofer, Lincoln Land Community College
CARLI Staff Liaisons: Cindy Clennon, Jenny Taylor

Introduction

The Commercial Products Committee chose to survey major streaming video vendors to obtain consistent information about their practices and pricing models. Vendors were chosen based on feedback from committee members and the larger membership during an open conference call about issues related to managing streaming video. Issues raised on that call also contributed to the creation of the question set for the survey.

Survey results follow.

Vendor: Film Platform

Do you support IP recognition?	Yes
Do you support other types of authentication (OpenAthens, etc.)?	Support other types of authentication, but this would have to be discussed on an as needs by needs basis.
What pricing model(s) do you offer?	Vendor offers full Catalog subscription, PDA, and per title pricing.
Do you offer perpetual access rights?	Presently, no perpetual rights are offered.
Does the license include public performance rights? Do these rights have limitations?	
Do you have current titles lists on your website?	Yes. The list is updated constantly. https://docs.google.com/spreadsheets/d/193jTBxt4luAC_CIthHcCJ9T2Njpb9dS7WPZ_MjGZdDk/edit?usp=sharing
Do your videos have transcripts available?	Yes. Many of their films have transcripts available. If a transcript for a specific film is missing, a school/user can request this and we can make it available within 10 business days.
Do your videos have closed captioning?	The majority of films have subtitles or closed captions. Users can also make a request for captions and/or subtitles and we will make these available within 10 business days or less
Can users (faculty, students, etc.) create and use clips from the video content for educational purposes?	Yes, users can create clips for educational purposes Vendor calls it "bookmarks."
Can videos be embedded in course management systems?	Currently links can be embedded in LMS systems and the vendor is working on the direct video embedding which should be functional on our platform shortly
What do you offer in terms of training and user/technical support?	Online user guides and webinars offered.
How much of your content is considered educational, and how does your company define the word 'educational'?	All of our content is educational. The vendor defines 'educational' as "premium factual content with clear academic relevance".
Additional comments	n/a
Vendor contact information	n/a

Vendor: Films on Demand

Do you support IP recognition?	Yes, IP and Proxy authentication
Do you support other types of authentication (OpenAthens, etc.)?	IP, Proxy
What pricing model(s) do you offer?	Based upon FTE and Tier
Do you offer perpetual access rights?	Yes, single title if available
Does the license include public performance rights? Do these rights have limitations?	Yes. A fee cannot be charged to watch the film/video.
Do you have current titles lists on your website?	No. Available upon request
Do your videos have transcripts available?	Yes, except for musicals
Do your videos have closed captioning?	98% except for musical performances, foreign films with subtitles or any program less than 10 minutes
Can users (faculty, students, etc.) create and use clips from the video content for educational purposes?	Yes, they can create their own account with personal playlist
Can videos be embedded in course management systems?	Yes. Canvas, D2L, moodle, Blackboard, Google classroom, Sakai, Schoology, ClasLink, Office 365, LiveText
What do you offer in terms of training and user/technical support?	Prerecorded webinars and demo sign up every month. Technical Support is available by phone, email and live chat
How much of your content is considered educational, and how does your company define the word 'educational'?	All content would be applicable in a classroom setting for educational purposes
Additional comments	Individual packages and single titles available to purchase. We have: Feature Films for Education Collection http://www.infobase.com/wp-content/uploads/2018/04/FS_FeatureFilms_A.pdf
Vendor contact information	Respondant: Aviva Matan (Zimmerman) Email: aviva@filmplatform.net

Vendor: Kanopy

Do you support IP recognition?	Yes
Do you support other types of authentication (OpenAthens, etc.)?	Kanopy works with almost all methods of authentication that a library may employ. Most typically, this will include IP access for on-campus access and then one form of system for off-campus access (e.g. EZproxy, Shibboleth, WAM, VPN, password, barcode pattern, etc).
What pricing model(s) do you offer?	PDA or Upfront License for 1 or 3 year license
Do you offer perpetual access rights?	No, one or three year license only
Does the license include public performance rights? Do these rights have limitations?	Kanopy videos can be watched by any and all authorized viewers, whether in a group or individual viewing context. Viewing films in a group forum is permitted as long as the viewing is by authorized viewers and it is not for commercial benefit (i.e. no admission costs are charged and no profit is made from the screening).
Do you have current titles lists on your website?	Yes, arranged by subject: https://www.kanopy.com/subjects
Do your videos have transcripts available?	Yes. When viewing from your computer, you'll also have access to a dynamic transcript that will display lines in time with the video. To access this, click on More and select Transcript while the video is playing. The transcript will appear below the video.
Do your videos have closed captioning?	Yes. Hover your mouse over the CC icon that appears at the bottom right of the video player and select English (or another language if available). You will then see the closed captions appear along the bottom of the screen.
Can users (faculty, students, etc.) create and use clips from the video content for educational purposes?	Yes. https://help.kanopystreaming.com/hc/en-us/articles/209708397-Creating-clips-and-playlists
Can videos be embedded in course management systems?	Yes, you can easily share or embed any Kanopy film (or clip or playlist you create) through the sharing tools below the film. Embedding a film allows you to place the whole video player into another website (your library website, your course management system, your blog, etc) so that the film appears and can be watched there as opposed to having to click on a separate link to the film.
What do you offer in terms of training and user/technical support?	Support through email or phone. Some tutorials and FAQ on website. support@kanopy.com
How much of your content is considered educational, and how does your company define the word 'educational'?	n/a
Additional comments	n/a
Vendor contact information	https://www.kanopy.com/

Vendor: ProQuest/Alexander Street Press

Do you support IP recognition?	Yes
Do you support other types of authentication (OpenAthens, etc.)?	n/a
What pricing model(s) do you offer?	Various. http://www.aip.cz/download/tools/1713-as-video-for-any-need-intnl-v16.pdf
Do you offer perpetual access rights?	n/a
Does the license include public performance rights? Do these rights have limitations?	Yes. All films purchased from Alexander Street, whether streaming or DVD, include limited public performance rights, which includes permission for classroom showings, as well as public screenings, as long as no admission is being charged.
Do you have current titles lists on your website?	Depending on the collection all title lists can be found at http://www.alexanderstreet.com
Do your videos have transcripts available?	Accessibility statement: https://alexanderstreet.com/page/accessibility-statement
Do your videos have closed captioning?	Onscreen transcripts; see accessibility statement above.
Can users (faculty, students, etc.) create and use clips from the video content for educational purposes?	Yes
Can videos be embedded in course management systems?	Yes, with LTI capability
What do you offer in terms of training and user/technical support?	
How much of your content is considered educational, and how does your company define the word 'educational'?	Curated content for educational purposes that can be used in a variety of educational settings.
Additional comments	Link to Alexander Street Flyer: http://www.aip.cz/download/tools/1713-as-video-for-any-need-intnl-v16.pdf
Vendor contact information	Respondent: Shelley Geisenfeld, ASP.

Vendor: Swank

Do you support IP recognition?	Yes, IP authenticated with Proxy set up for off campus access
Do you support other types of authentication (OpenAthens, etc.)?	Yes, single sign or password protected.
What pricing model(s) do you offer?	A few different models: Title-by-Title, On-Demand or Demand Driven and Pre-set Collections: https://www.swank.com/digital-campus/getting-started/. All pricing models are also determined by few different factors; FTE, number of titles selected, multi-year options.
Do you offer perpetual access rights?	No 'perpetual' access, but are comfortable with licensing content up to 5 years, which in the digital world is almost perpetual.
Does the license include public performance rights? Do these rights have limitations?	No, the streaming rights do not include Public Performance Rights, although Swank does provide the PPR licensing for campus events, it is a separate license.
Do you have current titles lists on your website?	We have suggested title lists broken out by different, subjects, themes, etc..: https://www.swank.com/digital-campus/movies-tv/. You can also search all 26,000 titles available on the website at the top right search feature.
Do your videos have transcripts available?	No, the scripts for these films are retained by the original writers and under a different set of rights.
Do your videos have closed captioning?	Yes
Can users (faculty, students, etc.) create and use clips from the video content for educational purposes?	We are developing that functionality and should have that as a new feature releasing the summer.
Can videos be embedded in course management systems?	Yes
What do you offer in terms of training and user/technical support?	We provide a live tutorial of the site features after purchase. Dedicated Account Managers are assigned for each client to help with the day to day activity. A Digital Support team on call via phone or email for any technical issues.
How much of your content is considered educational, and how does your company define the word 'educational'?	A very subjective question, I would answer that educational to me would be defined as using the content for an academic use in support of the faculty syllabus. With that in mind, the easy answer would be 100% of the content is educational

	because the faculty who are selecting the titles are truly selecting them for curriculum support. However, in a traditional definition our content is unique in that is heavily Feature Film based, so popular films like; Citizen Kane, Do the Right Thing, The Matrix, Glory, Get Out and Moonlight. We do have access to over 600 Documentary Films and over 500 International films as well, but the main bulk of the catalog, exclusive to Swank, is of course Feature Film based. https://www.swank.com/digital-campus/customer-stories/
Additional comments	Schools can reach out to set up a quick webinar to walk through what the streaming portal looks like, what licensing model would make the most sense, content options, best practices from other schools and answer any questions they may have.
Vendor contact information	Mike Eyler <meyler@swankmp.com>

2017–2018 CARLI Created Content Committee:
Annual Report of Activities and Annual Project

Members

Ian Collins (2015-2018), University of Illinois at Chicago
Ellen Corrigan (2014-2020), Eastern Illinois University, **chair**
Alice Creason (2014-2018), Lewis University
Marlee Graser (2017-2020), Southern Illinois University Edwardsville
Colin Koteles (2017-2018), College of DuPage
Tricia Lampron (2017-2020), University of Illinois at Urbana-Champaign
Greer Martin (2017-2018), Illinois Institute of Technology
Matthew Short (2016-2019), Northern Illinois University
Rebecca Skirvin (2016-2018), North Central College (resigned)
CARLI Staff Liaisons: Amy Maroso and Elizabeth Clarage

Introduction

Rather than focusing efforts on a single large project, members of the Created Content Committee (CCC) worked on several smaller projects over the course of the year. Most of these activities centered around two main themes: documentation and promotion of digital collections.

Committee members met by conference call each month to plan activities, discuss progress, and offer feedback, communicating by a group email list between meetings. The committee maintained collaborative workspace on the CARLI website and on Google Drive.

Documentation Activities

Committee members spent the first half of the year performing a review of committee-created documents on the CARLI website. Historically, CCC's predecessor, the Digital Collections Users' Group, had a documentation subcommittee responsible for creating and maintaining best practices documents (see: "Best Practices for Digital Collections section of https://www.carli.illinois.edu/products-services/contentdm/cdm-documentation) and other documents. With the reorganization of committees and the advent of the annual project, the task of updating current documents and creating new ones fell by the wayside.

As part of this comprehensive review, all of the "Guidelines for the Creation of Digital Collections" best practices documents were reviewed and updated. The Guidelines for the Creation of Digital Collections: Best Practices for Metadata was revised into two separate documents, one dealing with best practices for descriptive metadata in CARLI Digital Collections (see: https://www.carli.illinois.edu/sites/files/digital_collections/documentation/guidelines_for_cdc_metadata.pdf) and the other addressing the broader topic of shareable metadata for use by all CARLI member libraries (see: https://www.carli.illinois.edu/sites/files/digital_collections/documentation/guidelines_for_shareable_metadata.pdf).

Also in connection with the documentation review, a new resource guide titled "Digital Projects 101: A Resource Guide" (see: https://www.carli.illinois.edu/products-services/contentdm/digital_projects_101) was created to assist member libraries in developing and maintaining digital collections. Initially based on the now-defunct public wiki, this guide covers aspects of the digital project process that fall outside the scope of the best practices documents. The guide lists print and web resources on topics including creating digital objects, outsourcing digitization, digital asset management systems, copyright, digital preservation, grants and funding, and marketing. Committee member Alice Creason served as principal author of the guide.

Other resources generated by past committee endeavors, such as webinar presentations and podcasts, were also reviewed to ensure currency and relevance to the present-day audience. Links to outdated or superseded materials were removed and the materials archived (see: "CARLI Sponsored Digital Projects Webinars and Resources" section of https://www.carli.illinois.edu/products-services/contentdm/cdm-documentation).

Promotion of Digital Collections Activities

In the second half of the year, committee members' attention turned to activities related to the promotion of digital collections. In previous years, the committee had participated in three ongoing promotional projects: "CARLI Digital Collections Featured Image," a biweekly feature on the CARLI website highlighting items from CARLI Digital Collections; "Digitized Book of the Month," a monthly feature on the CARLI website spotlighting member libraries' digital materials hosted in the Internet Archive; CARLI Digital Collections Tumblr, daily posts (Monday-Friday) on the social media site featuring items from the collections of current committee members' institutions.

Due to the inability to promote collections on Tumblr that were not collections created by members of the CCC, the committee inquired of CARLI administration as to whether all digital collections created by member libraries, regardless of hosting platform, could be included in promotional activities. As the CARLI Office worked with University of Illinois in Urbana-Champaign's legal office to create a document that would allow social media promotion of collections in CARLI Digital Collections (http://collections.carli.illinois.edu/), committee members opted to suspend promotion efforts in favor of developing educational programs and documentation to aid member libraries in promoting their own collections.

The educational outreach CCC did in this area consisted of a webinar on how several CARLI member libraries are using social media and other means to promote their digital collections. An extensive guide to digital collection promotion was also created and posted to the CARLI website.

Webinar: "Promoting Your Digital Collections," held on May 1, 2018

> Presented by the panel of Rachel Cole (Northwestern University), Lindsay Harmon (Lewis University), and Sata Prescott (Northern Illinois University), this program offered insights into digital collections promotion based on the speakers' real-world experiences. Topics discussed include using different strategies for different subjects and audiences, social media as well as non-digital marketing endeavors, developing partnerships, engaging in collaborative activities, tools for online exhibits and automation. Approximately 30 registrants attended the live session via Adobe Connect, with the session recording and slides subsequently made available on the CARLI website.

Document: "Guidelines for the Promotion of Digital Collections: Best Practices for Promoting and Marketing" (see: https://www.carli.illinois.edu/sites/files/digital_collections/documentation/guidelines_for_promotion.pdf)

> Committee members created a new best practices document for promoting digital collections. The extensive guide covers the use and pros and cons of many social media platforms; aggregation and sharing of metadata and digital objects using options like the Digital Public Library of America (DPLA), OAIster, and local platforms like EXPLORE Chicago. Working with partners to create and

promote digital projects; creating both physical and digital exhibits (and software that can be used for the latter) are explored. Incorporating digital collections into curricula and assessing promotion efforts are also covered.

Other Activities

Copyright Webinars: CCC organized and sponsored two webinars looking at copyright issues related to digital collections. Session recordings and slides were subsequently made available on the CARLI website (see: "CARLI Sponsored Digital Projects Webinars and Resources" section of https://www.carli.illinois.edu/products-services/contentdm/cdm-documentation).

February 1, 2018: Hannah Stitzlein, Visiting Metadata Services Specialist for the Illinois Digital Heritage Hub, presented "Standardized Rights Statements in Digital Collections." This program addressed RightsStatements.org, a joint initiative of Europeana and the Digital Public Library of America, and the application of rights statements developed by the initiative to communicate the copyright and re-use status of digital objects. Nearly 50 registrants attended the live session via Adobe Connect.

March 6, 2018: Sara Benson, Copyright Librarian at the University of Illinois at Urbana-Champaign University Library, presented "Librarian Superpowers." Intended as a copyright Q&A program, Ms. Benson shared her legal expertise to shed light on copyright law in relation to interlibrary loan, preservation, digitization, fair use, and associated matters. Nearly 40 registrants attended the live session via Adobe Connect.

On-going Committee Work

Google Analytics Reports: CCC continued the long-term ongoing activity of issuing quarterly Google Analytics dataset reports, prepared by committee member Matt Short. Based on keywords and traffic sources for CARLI Digital Collections, the reports are intended to inform and assist digital collections managers with project planning and assessment (see: https://www.carli.illinois.edu/products-services/contentdm/google-analytics-usage-reports-carli-digital-collections).

Summary and Conclusion

- Reviewed and updated all publicly-available documents, webinars, and podcasts (23 resources in total)
- Created two new documents: "Digital Projects 101: A Resource Guide" and "Best Practices for Promotion and Marketing"
- Organized and sponsored three webinars
- Produced quarterly Google Analytics usage reports

As the Created Content Committee has accomplished all of its goals for this year, it will be up to committee members in the new term to determine how best to serve the digital collections-related needs of CARLI member libraries next year.

Complete List of Documentation and Webinar Information

CONTENTdm Documentation page on CARLI website
https://www.carli.illinois.edu/products-services/contentdm/cdm-documentation
See the following sections:
Best Practices for Digital Collections
CARLI-Sponsored Digital Projects Webinars and Resources

Digital Projects 101: A Resource Guide
https://www.carli.illinois.edu/products-services/contentdm/digital_projects_101

Guidelines for Promotion of Digital Collections: Best Practices for Promoting and Marketing
https://www.carli.illinois.edu/sites/files/digital_collections/documentation/guidelines_for_promotion.pdf

Promoting Your Digital Collections webinar
https://www.carli.illinois.edu/products-services/contentdm/promoting_digital_2018

Webinar recording:
https://www.youtube.com/embed/lB8_pUWlsGY?rel=0&autoplay=0&width=640&height=480&iframe=true
Cole slides:
https://www.carli.illinois.edu/sites/files/digital_collections/documentation/Cole_Presentation.pdf
Harmon slides:
https://www.carli.illinois.edu/sites/files/digital_collections/documentation/Harmon_Presentation.pdf
Prescott slides:
https://www.carli.illinois.edu/sites/files/digital_collections/documentation/Prescott_Presentation.pdf

Copyright webinars
https://www.carli.illinois.edu/products-services/contentdm/copyright2018

Stitzlein webinar recording:
https://www.youtube.com/embed/BTfBklOjipw?rel=0&autoplay=0&width=560&height=315&iframe=true
Stitzlein slides:
https://www.carli.illinois.edu/sites/files/digital_collections/documentation/StandardizedRightsStatements.pdf
Benson webinar recording:
https://www.youtube.com/embed/1N1vITgavOY?rel=0&autoplay=0&width=560&height=315&iframe=true
Benson slides:
https://www.carli.illinois.edu/sites/files/digital_collections/documentation/Benson_copyright_2018.pdf

Google Analytics Usage Reports for CARLI Digital Collections
https://www.carli.illinois.edu/products-services/contentdm/google-analytics-usage-reports-carli-digital-collections

2017–2018 CARLI Instruction Committee:
Annual Report of Activities

Members
Colleen Bannon, 2015-2018, Midwestern University
Larissa Garcia, 2015-2018, Northern Illinois University
Amy Hall, 2017-2020, National-Louis University
Christina Heady, 2015-2018, Southern Illinois University Carbondale
Molly Mansfield, 2017-2020, Dominican University
Marielle McNeal, 2017-2020, North Park University
Matthew Olsen, 2016-2019, Millikin University, Co-Chair
April Purcell Levy, 2016-2019, Columbia College Chicago
Mackenzie Salisbury, 2016-2019, School of the Art Institute of Chicago, Co-Chair

CARLI Staff Liaisons
Debbie Campbell
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 committee held an initial in-person meeting at the CARLI office in Champaign on August 10, 2017. Subsequent meetings were held by teleconference and took place on the second Monday of the month from 1-2:30 pm. The committee also used the instruction@carli.illinois.edu mailing list and a Google Drive folder to share information and documents outside of meeting times.

Theme

The committee's theme for this year was "We Can't Do It Alone: Joining Forces for Sustainable Partnerships." Through this theme the committee sought to investigate ways that academic librarians can partner with teaching faculty or with other units on campus in order to create opportunities for library instruction that are effective, scalable, and sustainable. In order to explore this theme the committee planned a series of webinars to learn about successful programs and best practices for this kind of collaboration. The committee also carried this theme into the Instruction Showcase in both the call for proposals and a panel discussion of successful librarian/teaching faculty collaborations featuring representatives from both groups.

Webinars

On December 6, Stephanie Richter and Cameron Wills, both from the Faculty Development and Instructional Design Center at Northern Illinois University, presented the webinar, "Leading Online Sessions: Tips for Engaging Webinars." In this webinar about webinars, Richter and Wills discussed the best practices for developing and delivering effective webinars. Drawing on their extensive experience with online learning they also related common pitfalls that should be avoided in webinars. They presented this information in a way that was not tied to a specific technology, but could be utilized by librarians teaching online through a variety of platforms. 41 people registered for this event.

On March 19, Marielle McNeal, a librarian and Head of Teaching and Learning Services at North Park University and a member of the Instruction Committee, presented the webinar, “Train the Trainer: Ideas & Tips to Help Faculty Teach Information Literacy.” In this webinar, McNeal presented the details of several online and in-person workshops that she developed to equip teaching faculty at North Park University with the knowledge and skills to provide information literacy instruction in their own classrooms. She also suggested ways to begin conversations with teaching faculty about information literacy and how to bridge terminological divides between the two groups. 71 people registered for this event.

Both webinars are available from the CARLI website at: https://www.carli.illinois.edu/products-services/pub-serv/instruction.

Providing an Instruction Perspective

During the past year the committee applied its collective instruction expertise to several CARLI projects. In the fall the committee reviewed and gave feedback on a planned CARLI document depository. In the spring the committee invited Jessica Gibson from CARLI to discuss New VuFind at a meeting. Gibson answered questions and solicited feedback from the committee. Committee liaison Debbie Campbell also gathered input on several interface elements in New VuFind and drew on the committee’s experience providing instruction on the catalog.

Instruction Showcase

The committee held the sixth annual Instruction Showcase on May 31st at Dominican University in River Forest, IL. While the committee received fewer proposals than we would have liked for the Showcase, we received a sufficient number of high quality proposals to hold an in-person Showcase. In addition to the typical Showcase presentations and in keeping with our theme – “We Can’t Do It Alone: Joining Forces for Sustainable Partnerships” – we featured a panel with three librarians from the committee and teaching faculty with whom they have collaborated to provide information literacy instruction. The pairs answered questions about their partnership and what made it successful. The committee’s hope is that this provided a perspective on information literacy instruction that is rarely presented at library conferences.

Respectfully Submitted by
Matthew Olsen and Mackenzie Salisbury
Co-chairs, 2017-2018

2017–2018 CARLI Instruction Committee Annual Project:
We Can't Do It Alone: Joining Forces for Sustainable Partnerships
CARLI Webinar Series

Introduction

The committee's theme for this year was "We Can't Do It Alone: Joining Forces for Sustainable Partnerships." Through this theme the committee sought to investigate ways that academic librarians can partner with teaching faculty or with other units on campus in order to create opportunities for library instruction that are effective, scalable, and sustainable. In order to explore this theme the committee planned a series of webinars to learn about successful programs and best practices for this kind of collaboration. Both webinars are available from the CARLI website at: https://www.carli.illinois.edu/products-services/pub-serv/instruction.

Webinars

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In addition to both webinars being available from the CARLI website (https://www.carli.illinois.edu/products-services/pub-serv/instruction), this document includes descriptive outlines in order to provide easily accessible information for instruction librarians who were unable to attend the events or would like to refer back to ideas shared.

Leading Online Sessions: Tips for Engaging Webinars

Introduction

In this webinar, presenters share tips for producing engaging, interactive webinars no matter what platform you are using. Attendees learn the recommended techniques to prepare participants before they attend your live session and how to communicate with and manage the interactions of your participants. Best practices for designing online presentation content and the advantages of recording the session are also discussed.

Presenters

- **Stephanie Richter** is the Assistant Director of the Faculty Development and Instructional Design Center at Northern Illinois University in DeKalb, Illinois. She consults with and provides professional development for faculty on integrating technology into teaching and works closely with academic and support units at the university on their teaching and teaching with technology needs. Ms. Richter holds a Master of Science in Education in Instructional Technology from Northern Illinois University, and is currently pursuing a doctorate in Instructional Technology.

- **Cameron Wills** is a Research Associate for the Faculty Development and Instructional Design Center at Northern Illinois University in DeKalb, Illinois. In his role, he investigates best practices in teaching tools and technologies, and develops and delivers professional development on emerging instructional technologies. Mr. Wills holds a Master of Science in Education in Instructional Technology from Northern Illinois University and is currently pursuing a doctorate in Instructional Technology.

The Big Question: Why Hold an Online Session?

The first step to creating any online session, webinar, or conferencing session is to establish its purpose. The purpose serves as the foundation for a successful online session. In addition to driving content, the purpose should also be used to guide other important factors like intended audience, technology requirements, and confidentiality considerations.

Online sessions can be used to serve a variety of purposes, many of which go beyond teaching and training. These sessions can be used to:

- Deliver content by teaching or training.
- Share expertise by hosting a guest speaker or colleague.
- Create collaborative or group activities for students or faculty both on and off campus.
- Build a stronger sense of community by being more visible.

Decide what your session is going to accomplish and use that as the point of reference for the planning and design process.

Web Conferencing Platforms

There are a number of different platforms available but most have very similar features. Think back to the purpose of the online session to decide what features are needed to have a successful experience. When deciding on which platform to use, consider how interactive the session is going to be and whether a more formal or informal platform is needed. Also consider what your institution uses most frequently.

- Adobe Connect, WebEx, Blackboard Collaborate, Zoom, GoToMeeting, and Blue Jeans are popular vendor supplied platforms.
- Google Hangout, appear.in, and Skype are freely available and have a number of tools that can be used to facilitate engaging online experiences. Note that these are most often used for more informal purposes.

Preparing for the session

There are essentially five things you need to prepare for your online session.

1. Your slides

No one wants to look at a blank screen for an hour. On the flip side, overly busy slides can distract the audience from your content or make them feel like they could have read the content rather than attending the session. Neither are ideal. Here are some tips to strike a balance with your presentation.

Incorporate visuals that will keep your interactive session on track. PowerPoint is a great place to start preparing your presentation. For example, if you have an interactive element, like a poll or discussion question, create a slide as a reminder to yourself and as a focal point for your participants. Slides can also be used to guide discussion. Even if your session is meant to be a more flexible discussion, which does not necessarily warrant a rigid structure, still try to incorporate at least one slide or visual. However, it is important to note that an exception to using a visual could be if your session will mimic a face-to-face environment through the use of multiple webcams.

The simpler, the better when it comes to the message and appearance of your slides.

- Use plain backgrounds that contrast with the text.
- Use large Sans Serif fonts that are easy to read, like Calibri, Arial, Tahoma, or Verdana.
- Plan ahead and limit yourself to 4-6 bullets per slide. Each bullet should also only have 4-6 words. Avoid information overload but use an additional slide if you need it.
- Pace yourself. Each slide should take about a minute of your presentation time. Remember that the point is not to rush or cram information into your presentation, but to engage with your audience.

Think about the amount of bandwidth you will be using. Using audio, video, and visuals in your online presentation means using a lot of bandwidth, which can degrade the visual quality of your presentation. That means complex images or busier slides will be more difficult to view. Along those lines, it is a best practice to avoid the use of transitions or animations. Depending on the platform, animations may not render well. That means everything could appear on your slides all at once, which can be problematic depending on the content and the presenter's level of experience.

2. Your computer

Test your computer before the session! Check that you can access the platform, check your slides in the session (yes, click through them all), and make sure to turn off anything with notifications. If it dings, buzzes, or can distract you in any way then turn it off. That includes email, Skype, and instant messengers. In addition to being a potential distraction to you, it can be distracting to your audience if things keep popping up on the screen.

3. Your environment

Think about the area where you are presenting as a television studio. Lighting should probably be your first consideration. Avoid being back-lit. Any light facing a webcam will overwhelm the sensor, making everything appear either overly bright or dark. To fix this, turn off any lights that are behind you when you present. If possible, *add* lighting above you or behind your camera that illuminates your face. Also make sure you are in a quiet space. Post “Do Not Disturb” notices on your door or around your cubicle.

Turn off your cell phone, office phone, and other distractions. If you have multiple monitors, turn off the extra monitor. Take a look at what is behind you. It would be best to have a blank wall or backdrop but that is not always realistic. If presenting in your office, remove clutter or distracting décor out of the frame of your video. That might mean moving that mountain of papers slightly to the left, but it makes a huge difference to your audience.

4. Yourself

Think about yourself as a news anchor. Dress in darker or muted colors and stick to solid colors or simple patterns. Avoid white or pastel colors as they do not read well on camera. Do a camera test with your presentation outfit to see if the camera does anything funky.

Experiment with camera placement. See if there are areas where there is less monitor glare. This is especially true if you wear glasses. Try to keep the camera at about eye-level or higher. You want to feel comfortable making eye contact with the camera and thus your audience. And, let's be honest, you will also want to find your most flattering angle.

Not planning on stepping (or sitting) in front of the camera? Feel free to wear your bathrobe and bunny slippers if you are not going to appear on screen, but keep in mind that dressing professionally (even when your audience cannot see you) can make you feel more prepared and ready to present.

Practice your presentation in the web conferencing platform before your webinar. You will feel more confident during your presentation if you take the time familiarize yourself with all the features and tools in advance. This is especially helpful if you need to switch between presenting slides to an application share. Practice those steps in advance and make sure everything works the way you expect. Ideally you will be focusing on your content rather than on the presentation logistics.

Finally, keep water nearby. If your throat gets dry or you have difficulty speaking, take a moment to grab a drink. Don't be shy, your attendees will understand and they might even silently thank you.

5. Your participants

If you have any equipment requirements, let your participants know in advance. These can be computer specifications, internet connection requirements, use of specific browsers or plug-ins, or audio expectations like a headset and microphone. This can be done with a simple email. As a courtesy, provide a way for participants to test their system with the web conferencing platform in advance. This gives them time to modify their equipment, update their system, and troubleshoot any other problems that would prohibit them from participating.

Have a Plan B! If something goes wrong, be prepared to contact your participants with the details, i.e. a link to a different webinar platform or even a backup presentation time.

Send a reminder to your participants shortly before the beginning of the session. This has become a best practice. A reminder 15-30 minutes before the session is meant to be a kind gesture, so that participants do not need to dig through their email to find the link to connect. The reminder does not need to be long. The link, a brief message that says you are looking forward to seeing them, and a bit of information about when the platform will open should suffice.

Consider accessibility options. Almost every platform has a live captioning option. Or, if you have the means, you could use the webcam and a sign language interpreter. When that is not a realistic option, ask your participants in advance if they have a need for any type of accommodation.

Other Tips and Advice

- Online sessions can be useful tools to reach those who cannot be physically present.
- One presentation can serve multiple purposes: The synchronous webcast can be posted for asynchronous use at a later date on YouTube, as a podcast, and on the library website for workshops.
- If you will be giving online sessions for the foreseeable future, consider investing in a portable screen or photographer's backdrop to create a more professional and attractive filming environment.

Delivering the Session

At first, it can be difficult to get used presenting online because there are many things going on at one time. Therefore, it helps to have your notes prepared for what you'd like to say. Even a full script is okay, if you can read it naturally. Be sure to practice with someone you know.

Beginning – Before the session begins

Be in the session early (20-30 minutes). It helps to have time to get settled before everyone joins you. Create a welcoming environment by having a "welcome" slide that includes information such as the session title and session logistics. Greet participants as they enter. This can be individual greetings to participants as they enter or a periodic general announcement to welcome everyone and note that the session will begin soon. Consider including background music, if possible, which allows participants to check their audio. You might also think about having a poll question or trivia slides to keep participants interested. Encourage participants to test their microphone before the session begins

Beginning – When the session begins

Begin the session by introducing yourself. You want to let the audience know who you are and what you are going to discuss in the session. It is useful to provide a quick orientation of the web conferencing system (e.g., chat, audio settings, polling). This is particularly important since some people may be new to online sessions. Also, remember to start the recording. You may wish to start the recording after the introduction/orientation; however, it is easy to forget, so you may want to give yourself a reminder.

Middle

Remember to speak slowly and clearly. Look into the camera, not at your slides. Engagement with the webcam is important to make the session not boring. Avoid quick movement if you are using a webcam, because this doesn't read well on camera. Remember to smile! It can change the tone and cadence of your voice. Finally, if another participant is speaking, turn off your microphone to avoid feedback.

End

Remember to leave ample time for questions. It helps to have a solid exit line prepared so that participants know they can leave. For example, you can give reminders for next time, announcements, or where the recording will be available. Be sure to thank participants for joining the session.

Going Beyond Slides

A couple of other tools available in most web conferencing platforms:

Application Share.

- Use for demonstrating a software or sharing content from a file or website. This tool lets you show participants something that is on your computer.
- To prepare, launch the application to be shared and have it ready in the initial state you want to share with students. Be sure to close other programs and turn off notifications so they don't pop up while you are application sharing. Also, make sure your desktop is clean, so that participants can see shortcuts and appropriate icons.
- To implement, launch application share and be sure to describe the steps you are taking. Move slowly through the demonstration to allow time for the changes to be visible on participants' computers.

Whiteboard/Annotation

- Use for allowing participants to markup the shared content. This tool is great for interactive activities such as mind mapping or getting some consensus on a topic.
- To prepare, create a slide or document that participants can annotate. Note that you cannot use this tool with application share.
- To implement, be sure to give participants specific instructions on how you would like them to annotate the page. You may even want to save the results for later viewing, if appropriate, by taking a screenshot.

Polls

- Use multiple choice questions for gathering quick, informal responses. Polls can be used throughout the session to get to know your participants or check what they've understood so far. Note that in most platforms, poll data is not saved
- To prepare, write poll questions in advance and then create slides for them
- To implement, launch the poll and ask participants to answer. You can then share results with everyone, if appropriate

Breakout Sessions

- Use for collaborative discussions in small groups within a session. Participants in breakout sessions, for example, can work on answering specific questions or sharing personal experiences. A debrief can then take place in the main session.
- To prepare, create PowerPoint slides with instructions for the breakout activity. Participants will need to be a little more skilled at using the software since they will need to be able to turn on their microphones and use it to interact with one another. It helps to practice beforehand putting people into a session and coming back
- To implement, explain the task before putting participants in breakout groups. It is a good idea for you to move between groups to help, if necessary.

Q&A Tool

- Use for managing and responding to questions in a larger session. Instead of using chat, which can be unwieldy for very large sessions, this tool can be useful; however, it is more formal and restrictive. Also note that it is not available in all platforms, for example, not in Blackboard Collaborate.
- To prepare, enable the Q&A tool in the platform and include slides on how to use it
- To implement, it is best to assign someone other than the presenter to monitor the Q&A and answer questions, if possible. The person monitoring the Q&A can ask questions of the presenter at an appropriate time.

Session Takeaways

- Have a clear purpose, that is meaningful to your audience.
- Plan, plan, plan.
- Practice to improve your skills.

Train the Trainer: Ideas & Tips to Help Faculty Teach Information Literacy

Introduction:

"Train the trainer" is a model used to describe the practice of training faculty on the best ways to teach information literacy to students. Offering "train the trainer" opportunities is essential for a strong information literacy program, particularly at small to medium-sized academic libraries that rely heavily on one-shot sessions. The goal of the "train the trainer" model is to expand the reach of information literacy instruction by targeting faculty that teach courses across various disciplines. In this webinar, the presenter shared ideas and tips for equipping faculty with the skills that they need to effectively teach information literacy.

Webinar Learning Outcomes:

By the end of the webinar, attendees were able to :

1. Recognize the challenges and barriers that faculty often encounter in their approach to teaching information literacy.
2. Provide examples of teaching strategies, language choices, and conversation starters that can improve their communication with faculty.
3. Identify train-the-trainer opportunities on their campus that leverage faculty professional development to improve student learning.

Presenter:

- **Marielle McNeal** is the Head of Teaching and Learning Services at North Park University in Chicago, where she coordinates and leads the library's efforts to integrate information literacy across the curriculum. She received a bachelor's degree in English and Professional Writing from Eastern Illinois University and a master's degree in Library and Information Science from the University of Illinois at Urbana-Champaign. She is currently working toward a master's degree in Higher Education Administration and Leadership. Her professional interests include information literacy instruction for at-risk students, information literacy in the health sciences field, and the librarian's role in faculty development.

Whose responsibility is it teach information literacy?

Information literacy instruction is a dual responsibility of librarians and faculty. The introductory text for the ACRL Framework emphasizes the importance of faculty collaboration and professional development. The ACRL Framework states that:

- "**Teaching faculty** have a greater responsibility in designing curricula and assignments that foster enhanced engagement with the core ideas about information and scholarship within their disciplines."
- "**Librarians** have a greater responsibility in identifying core ideas within their own knowledge domain that can extend learning for students, in creating a new cohesive curriculum for information literacy, and in collaborating more extensively with faculty."
  (ACRL Framework, 2015)

Teaching Information Literacy: Librarian Frustrations vs. Faculty Challenges

There are a number of common challenges and frustrations that librarians face in their work with faculty. For example, librarians may feel like their instruction efforts are unsuccessful due to miscommunication with faculty. They may also feel like poorly designed assignments make it challenging to plan one-shot sessions. Lastly, librarians often feel under or utilized because of faculty expectations.

However, in addition these common challenges and frustrations, faculty are faced with their own barriers when it comes to teaching information literacy. Faculty often:

- Have a limited understanding of the factors that affect students' information literacy.
- Are unfamiliar with information literacy concepts and knowledge practices.
- Have limited time in their course syllabus to incorporate additional topics, content, or assignments.
- Are unaware of the best practices for teaching and incorporating information literacy into their course or discipline.

What is train the trainer? The "train the trainer" model can be useful in the effort to fully integrate information literacy into the curriculum and impact student learning on a larger scale. Train the Trainer focuses on educating faculty about the challenges and barriers that students encounter when doing research. Faculty are also educated about the best practices and strategies for teaching information literacy. Lastly, librarians train faculty how to integrate and scaffold information literacy into their courses. Instead of focusing only on educating students, the "train the trainer" model equally prioritizes the importance of educating faculty.

Train the Trainer Ideas:

Before developing a "train the trainer" program at your library, first think about the ways you can take advantage of the professional development opportunities that are already available on your campus. For example, is there a new faculty seminar or group that meets regularly on your campus? Is there a faculty common read program or book discussion group? The following "train the trainer" ideas were briefly highlighted during the webinar:

- Workshops: Lead a single workshop or series on information literacy teaching strategies or the best practices for designing effective research assignments. Librarians can also design a workshop series that is based on each of the ACRL's Frames.
- New Faculty Seminar: New faculty are usually eager and open to receiving help when it comes to designing a new assignment or course. Talk to your Provost or Dean about offering a "train the trainer" session during the new faculty seminar.
- Book Discussions/Common Read: Suggest a book or group of articles on the topic of information literacy, scaffolding research skills, or innovation teaching strategies.
- Online Learning: Collaborate with your online learning department to design a self-paced course, tutorials, modules, or a webinar.

Survey Your Faculty

If you uncertain about what "train the trainer" topics the faculty on your campus would benefit from the most, start by surveying a select group. Examples of survey questions include:

1. What critical thinking/research skills are the most challenging to teach? (Refining a topic, developing a good research topic, finding sources, evaluating sources, incorporating sources, plagiarism/misuse of sources, etc.)

2. What types of professional develop/training opportunities do you prefer? (Webinars, in-person workshops, self-paced courses, reading/discussion groups, online tutorials/modules, etc.)

Train the Trainer Topics

If you prefer not to send a survey, there are several "train the trainer" topics that faculty on just about every campus could benefit from learning more about:

1. Creating Effective Research Assignment: There is an abundance of assignment "checklists" that librarians have created and made available online. However, many faculty could benefit from learning how to properly scaffold information literacy skills into an assignment.
2. Assignment Ideas: The traditional 8-10 page paper is often not the most effective way to teach research skills. Faculty can benefit from learning new ways to teach students how to develop good research questions, evaluate sources, analysis sources, etc. The ACRL Framework Toolkit has some great assignment ideas.

Assignment Design Webinar

In Fall 2017, the presenter facilitated a "train the trainer" webinar for the faculty at North Park University. The webinar focused on Best Practices for Creating Effective Research Assignments. The goal of the webinar was to provide seven simple best practices for designing effective research assignments that faculty could use to create new assignments or revise existing ones.

Learning Outcomes for Faculty Attending the Webinar:

- Understand the common challenges and barriers that student encounter when doing research.
- Understand how the best practices for designing effective research assignments can positively impact student learning.
- Understand the benefits of collaborating with a librarian when creating or revising a research assignment.

The webinar focused on the following seven best practices:

1. Determining the learning goals for the assignment
2. Identifying the appropriate type of assignment
3. Knowing your students' research preparedness
4. Providing a roadmap/guide for the assignment
5. Scaffolding the assignment
6. Testing the assignment
7. Collaborating with a librarian

Planning the Webinar:

The webinar was part of the "Webinar Wednesday Series" that was started by the Center for Online Education at North Park University. The series was originally created to educate faculty about various tips for using the Canvas Learning Management System. However, the series was then expanded to include more general teaching and learning topics. The following chart provides details on the planning process for the webinar:

Logistics	Checklist
Canvas LMS Big Blue Button (integrates with Canvas)	❑ Learning Outcomes ❑ Identify 7 best practices to highlight
Webinar Wednesdays Series Email reminders sent to faculty	❑ Create Slides ❑ Outline/Notes
Webinar recording saved to Vimeo and posted to Canvas	❑ Assessment

In addition to recording of the webinar, an assignment design template was also made available to faculty. The template provided faculty with a step by step process for designing a research assignment. The template also asked faculty to reflect on the following questions:

- How does the assignment align or integrate with the learning outcomes for the course?
- What are the learning targets for the assignment?
- What are the most critical steps of the assignment? How will you break this into small parts?

In-Person Workshops

In addition to the Assignment Design Webinar, the presenter also facilitated two in-person workshops at North Park University. The first workshop was tailored for faculty that teach the first-year seminar course. The second workshop was targeted for faculty interested in participating in the university's new Catalyst Semester.

Workshop 1: Critical Thinking and Information Sources in the First Year Seminar Course

Learning Outcomes:

- Understand the common challenges and barriers that first-year students encounter when navigating the information landscape.
- Understand the importance of incorporating beginner level "information literacy" related assignments in the first-year seminar course.
- Develop an information literacy assignment that helps students improve their critical thinking skills.

Workshop 2: Creating Effective Research Assignments for City-Centered Learning

Learning Outcomes:

- Understand the purpose and benefit of incorporating city-centered research assignments into a course.
- Understand the common challenges and barriers in finding, accessing, and analyzing Chicago neighborhood data/information.
- Understand the best practices for designing city-centered research assignments.
- Understand the value of collaborating with a librarian when designing city-centered research assignments.

Three tips for Educating Faculty:

1. Instructional Design: Dumping loads of information on faculty will not help to facilitate learning! Use an instructional design model to help organize content in a way that will help faculty understand and retain the information. For the in-person workshops, the presenter used Gagne's Nine Events of Instruction.

Event	What is it?	How to Use it
Gain attention	Capture learners' attention	Show a video, share an article, or the findings from a report about information literacy
Describe instructional goal	Explain why it's useful	Handout or PowerPoint with LO's
Stimulate prior knowledge	Help connect what they already know or have tried with what they will learn	Ask faculty to share what strategies/assignments they have tried in the past

Event	What is it?	How to Use it
Present material to be learned	Organize material into segments/chunks	Present content but also incorporate time for discussion
Provide guidance for learning	Provide support and resources	Handouts Libguide Examples of Activities/Assignments
Elicit performance (practice)	Allow learner to apply skills	Worksheet Assignment Design Template

2. Build Your Case: Use recent research about information literacy such as Project Information Literacy publications or Stanford University's "Evaluating Information: The Cornerstone of Civic Online Reasoning" report to communicate the importance of information literacy instruction. Presenting assessment data about the information literacy skills of first-year students on your campus is also helpful.

3. Conversation Starters: Use conversation starters to help faculty reflect on information literacy and student learning. Some examples of conversation starters include:
    - What do you wish your students better understood about research?
    - What part of the research process do your students struggle with the most?
    - What is missing from your students' research assignments/papers?
    - What part of your assignment is the most challenging for students?
    - What critical thinking skills or knowledge are needed for research in your discipline?

4. Language Choices: Avoid library jargon! Listen closely to to the words/phrases that faculty use when discussing information literacy.

Librarians	Faculty
Information Literacy	Critical Thinking Intelligent Use of Information Critical Analysis
Integrating/Scaffolding Information Literacy	Research Process Research Steps
Life-long learning	Self-motivation Active-citizenship Personal development

5. Invite Your Supporters: If you are offering a "train the trainer" workshop on your campus, invite 1-2 faculty members that you have a successfully worked with in the past. Ask them to share what they have learned about information literacy from working with you. Lastly, be transparent about the collaboration and learning process.

Resources to Share with Faculty

- Community of Online Research Assignments (CORA): https://www.projectcora.org
- Framework for Information Literacy Sandbox (ACRL): http://sandbox.acrl.org
- "Big Picture" Video Tutorials (NCSU): http://www.lib.ncsu.edu/tutorials
- Teaching and Learning Guide (ACRL): http://acrl.libguides.com/slilc/teaching
- Handouts, Worksheets, and Activities for Information Literacy (Indiana Univ): https://libraries.indiana.edu/handouts-worksheets-activities-information-literacy#handouts

Recommended Readings

- Cox, J. L., & VanderPol, D. (2004). Promoting information literacy: A strategic approach. *Research Strategies*, 20(1/2), 69-76.
- Meulemans, Y. N., & Carr, A. (2013). Not at your service: building genuine faculty-librarian partnerships. *Reference Services Review*, 41(1), 80-90.
- Smith, R.L., & Mundt, K.E. (2006). Philosophical Shift: Teach the Faculty to Teach Information Literacy [White Paper]. Retrieved March 10, 2018, from Association of College and Research Libraries: http://www.ala.org/acrl/publications/whitepapers/nashville/smith.
- Veach, G. L. (2009). Teaching Information Literacy to Faculty: An Experiment. *College & Undergraduate Libraries*, 16(1), 58-70.

2017–2018 CARLI Preservation Committee:
Annual Report of Activities

Members:

Mary Burns, 2017-2020, Northern Illinois University
Susan Howell, 2017-2020, Southern Illinois University Carbondale
Jennifer Hunt Johnson, 2016-2017, Illinois State University (resigned due to employment change)
Emma Lincoln, 2017-2019, Augustana College
Ann Lindsey, 2017-2020, University of Chicago
Jamie Nelson, 2015-2018, DePaul University
Bonnie Parr, 2016-2019, Abraham Lincoln Presidential Library and Museum, Co-Chair
Meghan Ryan, 2016-2019, National Louis University
Melanie Schoenborn, 2015-2018, Southern Illinois University Edwardsville
Anne Thomason, 2014-2018, Lake Forest College, Co-Chair

Staff Liaisons:
Elizabeth Clarage
Nicole Swanson

Meetings:

The Preservation Committee met 11 times during 2017-2018:

- 1 in-person meeting – July 20, 2017 (CARLI Office, Champaign)
- 10 conference calls – September 11, October 16, November 13, and December 11, 2017; January 8, February 12, March 12, April 9, May 14, and June 11, 2018

Activities:

- Maintained and updated the Preservation Resources webpage: https://www.carli.illinois.edu/products-services/collections-management/preservation-resources
- The 2017-2018 Annual Project was "Communicating the Value of Preservation". This theme was developed in the following CARLI Newsletter Preservation Tips:
    - "CARLI Preservation Committee 2017-18 Annual Project: Communicating the Value of Preservation", Melanie Schoenborn, Southern Illinois University Edwardsville, https://www.carli.illinois.edu/carli-preservation-committee-2017-18-annual-project-communicating-value-preservation
    - "The Importance of Environmental Monitoring", Bonnie Parr, Abraham Lincoln Presidential Library & Museum, https://www.carli.illinois.edu/products-services/collections-management/importance-of-environmental-monitoring
    - "Communicating the Value of Preservation – Disaster Response", Jen Hunt Johnson, University of Notre Dame, https://www.carli.illinois.edu/products-services/collections-management/disaster-response

- “Communicating the Value of Preservation – Working with Facilities…A Cautionary Tale”, Anne Thomason, Lake Forest College, https://www.carli.illinois.edu/products-services/collections-management/facilities
    - “Communicating the Value of Preservation – Staff Training”, Mary Burns, Northern Illinois University, https://www.carli.illinois.edu/products-services/collections-management/preservation-staff-training
    - “Communicating the Value of Preservation – Student Worker Training”, Melanie R. Schoenborn, Southern Illinois University Edwardsville, https://www.carli.illinois.edu/products-services/collections-management/training-student-workers
    - “Communicating the Value of Preservation - Digital Preservation Program”, Ann Lindsey, The University of Chicago Library, https://www.carli.illinois.edu/products-services/collections-management/digital-preservation-program
    - “We’re All in This Together - Communicating the Value of Preservation to Users and Stakeholders”, Meghan Ryan, National Louis University, https://www.carli.illinois.edu/products-services/collections-management/users-and-stakeholders
    - “What is the CARLI Last Copy Program?”, Susan Howell, Southern Illinois University Carbondale, https://www.carli.illinois.edu/products-services/collections-management/last-copy-program
    - “Communicating the Value of Preservation – The Preservation Elevator Speech”, Jamie Nelson, DePaul University, https://www.carli.illinois.edu/products-services/collections-management/preservation-elevator-speech
    - “Summary of Annual Project: Communicating the Value of Preservation”, Ann Lindsey, The University of Chicago Library, https://www.carli.illinois.edu/products-services/collections-management/communication-value-preservation-project-summary
- Other newsletter articles contributed by Committee members include:
    - “What can you learn from a workshop titled: Salvaging Mold and Water Damaged Library Materials: A Preservation Workshop”, Mary Burns, Northern Illinois University, and Melanie Schoenborn, Southern Illinois University Edwardsville, https://www.carli.illinois.edu/what-can-you-learn-workshop-titled-salvaging-mold-and-water-damaged-library-materials-preservation
    - “Preservation Week, April 22-28, 2018”, Meghan Ryan, National Louis University, https://www.carli.illinois.edu/carli-news-march-28-2018
- “University of Chicago Preservation Department and Oriental Institute Open Houses”, Jamie Nelson, DePaul University, https://www.carli.illinois.edu/university-chicago-preservation-department-and-oriental-institute-open-houses
- Sponsored Salvaging Mold and Water Damaged Library Materials: A Preservation Workshop at the Abraham Lincoln Presidential Library and Museum on July 11, 2017 for 26 attendees, https://www.carli.illinois.edu/salvaging-mold-and-water-damaged-library-materials-preservation-workshop
- Anne Thomason presented a report on the Committee’s 2016-2017 Annual Project (Disaster Planning) at the CARLI Annual Meeting on November 17, 2017.

- Sponsored Preservation Open Houses at the University of Chicago Library and the Oriental Institute at the University of Chicago on April 20, 2018 for 30 attendees, https://www.carli.illinois.edu/university-chicago-preservation-department-and-oriental-institute-open-house

Future activities:

- Sponsor a workshop on June 13, 2018 at the Illinois Fire Services Institute in Champaign. The workshop will include fire extinguisher training and burn simulation/recovery of library materials, https://www.carli.illinois.edu/ifsi-burn-simulation-and-recovery-workshop.
- Plan for a Collections Care workshop about protective enclosures, slated for Spring 2019.
- Continue to contribute Preservation Tips to the CARLI newsletter.
- Maintain the Preservation Resources Webliography, https://www.carli.illinois.edu/products-services/collections-management/preservation-resources.
- Develop a new Annual Project on a preservation topic for 2018-2019.

Submitted by co-chairs Bonnie Parr and Anne Thomason, 5/31/2018

2017–2018 CARLI Preservation Committee Annual Project: Communicating the Value of Preservation

The theme of this year's CARLI Preservation Committee's Annual Project is communicating the importance of preservation to users and stakeholders. It is easy to think that most stakeholders in cultural institutions already understand this importance, but that may not always be the case. Members of the Committee wrote blog articles throughout the year discussing how vital this communication is. As a preservation professional, you might provide the first exposure to preservation for a student worker, facilities manager, or user. You may work with other staff or administrators who have a vague idea of preservation, but lack specifics. These articles address the various and vital stakeholders and how you can approach them to increase their knowledge of preservation activities and gain vital allies along the way. The following blog articles written on communicating the value of preservation, which were shared in the CARLI Newsletter as Preservation Tips, culminated in the creation of a *Communicating the Value of Preservation* webpage on CARLI's website at https://www.carli.illinois.edu/products-services/collections-management/communicating-value-of-preservation:

- "CARLI Preservation Committee 2017-2018 Annual Project: Communicating the Value of Preservation Introduction";
- "Environmental Monitoring";
- "Disaster Response";
- "Working with Facilities";
- "Staff Training";
- "Student Worker Training";
- "Digital Preservation Program";
- "Users and Stakeholders";
- "CARLI Last Copy Program";
- "The Preservation Elevator Speech";
- "Summary of Annual Project".

2017-2018 Committee
Mary Burns, Northern Illinois University
Susan Howell, Southern Illinois University Carbondale
Jennifer Hunt Johnson, Illinois State University (partial year)
Emma Lincoln, Augustana College (partial year)
Ann Lindsey, University of Chicago
Jamie Nelson, DePaul University
Bonnie Parr, Abraham Lincoln Presidential Library and Museum, Co-Chair
Meghan Ryan, National Louis University
Melanie Schoenborn, Southern Illinois University Edwardsville
Anne Thomason, Lake Forest College, Co-Chair

Elizabeth Clarage, CARLI liaison
Nicole Swanson, CARLI liaison

Communicating the Value of Preservation **Home Page**

- Introduction
- Environmental Monitoring
- Disaster Response
- Working with Facilities
- Staff Training
- Student Worker Training
- Digital Preservation Program
- Users and Stakeholders
- CARLI Last Copy Program
- The Preservation Elevator Speech
- Summary of Annual Project

We're All in This Together - Communicating the Value of Preservation to Users and Stakeholders

Meghan Ryan, National Louis University

Library materials are a shared resource. So, the importance of preservation awareness and proper care of materials cannot be understated since they will ultimately impact user and stakeholder activities such as research and instruction. There are a few ways to communicate the value of preservation to users. One approach is to develop and implement policies and procedures for the use of library materials and to make those policies accessible. In some environments, such as in archives and special collections, making sure users have read and understood proper protocols is key. Policies can clarify that the use of library material supports preservation activities and is based on the department's preservation goals. Outreach activities are another way to raise preservation awareness. Garnering interest in library preservation activities through exhibits or social media can be fun and creative ways to get the word out. Exhibits, tutorials, and social media posts can showcase the ways in which preservation activities are critical to ensuring that library materials will be used by future generations.

Developing policies that specify proper treatment of library materials is a great way to not only be consistent, but also convey the importance of preservation to users and stakeholders, especially when dealing with the realities of less than desirable environmental conditions. Handling of materials can impact their condition and structure; therefore, proper practices are necessary. In order to articulate these practices to users, it is critical for a preservation program to develop a solid policy and create a statement about how to care for library materials. In an archives and/or special collections environment specifically, policies should outline "handling and care" instructions that are made visible to users in some capacity. In addition, they should communicate that these practices are mandatory since the materials are rare or unique and are difficult or impossible to replace. Examples of what to include in a "handling and care" section can include, but are not limited to:

- Staff will retrieve materials from the stacks and re-shelve them.
- Materials may not be removed from the building at any time.
- Researchers must use pencil if taking handwritten notes.
- All users must wear gloves when handling photographic materials.
- No food or drink near collection materials.
- Make sure your hands are clean.
- Keep materials on a flat surface.

A policy with these specific instructions would be difficult to implement across the board for all library materials, and is not necessary. Items from a library's main circulating collection are likely easier to replace; therefore, a fee for items returned damaged or lost would be one way to encourage proper handling. Also, it is a good idea to make these policies visible to users by adding them to your library's website.

Another way to convey the importance of preservation of library materials to users and stakeholders is through outreach. For example, online tutorials and exhibits can showcase preservation practices and how the implementation of procedures can benefit library materials. Tutorials can demonstrate how these materials are used and shared, the various ways one may contribute to the degradation of the material, how to prevent it, and how library funds may be used to replace damaged items. Exhibits can be a great way to present a library's preservation methodologies by showing specific activities, such as creating housing for materials and which tools are used. Exhibits are also an opportunity to display before and after images of treatments- showing the user the impact of preservation practices.

Using social media, such as Instagram, Facebook, Twitter, or department blogs, is another way to communicate the value of preservation. For example, ↗ Northwestern University Library's Preservation Instagram has a great mix of highlights from their collections and various ways they are working to preserve their materials. For more ideas about spreading the word about preservation awareness to users and stakeholders, the Association of Library Collections & Technical Services (ALACTS, a division of the American Library Association) has some ideas on their ↗ Preservation Week page. While Preservation Week is a preservation awareness campaign that typically takes place at the end of April, many of the ideas can be implemented year round!

Resources:

Association of Library Collections & Technical Services. ↗ Preservation Week.

nul_prescons. ↗ NU Library Preservation: Preservation and Conservation at Northwestern University [Instagram posts].

Please view all 11 articles from the *Communicating the Value of Preservation* webpage at: https://www.carli.illinois.edu/products-services/collections-management/communicating-value-of-preservation.

2017–2018 CARLI Public Services Committee:
Annual Report of Activities

Members:
Rachel Bicicchi, 2018-2019, Millikin University
Anne-Marie Eggleston Green, 2015-2018, Kishwaukee College
Marissa Ellermann, 2016-2019, Southern Illinois University Carbondale
Susan Franzen, 2015-2018, Illinois State University, Co-chair
Aaron Harwig, 2017-2020, College of DuPage
Joanna Kolendo, 2016-2019, Chicago State University
Nestor Osorio, 2017-2020, Northern Illinois University
Cory Stevens, 2015-2018, Lake Forest College, Co-chair
Nancy Weichert, 2018-2020, University of Illinois at Springfield

Mid-Year Committee Changes:
Sarah Hill, 2017-2018, Lake Land College
Colleen Shaw, 2016-2017, Heartland Community College, Co-chair
Richard Stokes, 2014-2017, University of Illinois at Urbana-Champaign

CARLI Staff Liaisons:
Elizabeth Clarage
Denise Green

Meetings:
The Public Services Committee held one in-person meeting this year and met ten times by conference call.

Activities:
- **Open House**:
  Hosted by Millikin University, March 15, 2018
  - Tour of the University Commons including Staley Library, the New Technologies Studio, and library instruction program.
  - Presentation by Patricia Tomczak, Dean of Libraries and Information Resources, Quincy Univeristy.
  - Panel Presentation on combined services by various members of Student Services.
  - Registrants: 56
- **Open House**:
  Hosted by the University of St. Francis – April 6, 2018
  - Presentation by Shannon Pohrte Wenzel, Director of Brown Library, University of St. Francis, "Shared Circulation & Reference Desk Experience at USF."
  - Tour of the University of St. Francis Brown Library.
  - Presentation by Nancy Weichert, Instructional Services Librarian, University of Illinois at Springfield, "Beta Desks and Planning for a New Service Model."
  - Registrants: 41
- **Annual Project**: Service Models: Resources and Presentations

  URL: https://www.carli.illinois.edu/public-services-models

Respectfully submitted,
Members of the 2017-2018 Public Services Committee

2017–2018 CARLI Public Services Committee Annual Project:
Library Public Services Models
Resource List and Presentations on the CARLI Website

2017-2018 Committee
Rachel Bicicchi, Millikin University
Anne-Marie Eggleston Green, Kishwaukee College
Marissa Ellermann, Southern Illinois University Carbondale
Susan Franzen, Illinois State University, Co-Chair
Aaron Harwig, College of DuPage
Joanna Kolendo, Chicago State University
Nester Osorio, Norther Illinois University
Cory Stevens, Lake Forest College, Co-Chair
Nancy Weichert, University of Illinois at Springfield

Mid-Year Committee Changes:
Colleen Shaw, Heartland Community College
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https://www.carli.illinois.edu/public-services-models

Library Public Services Models: Resource List and Presentations

Introduction

In light of academic libraries reimagining and combining service points to improve user experience, consolidate staff functions, and redesign public areas, the CARLI Public Services Committee's theme for 2017-2018 was the examination of merged service points.

In addition to two Open Houses focused on this topic, the committee created a short bibliography of recent articles on merged service points from various perspectives: design, staffing and training, blending library and information technology functions, and reference service.

The two open houses featured remodeled library public spaces. The first was hosted by Staley Library at Millikin University in Decatur, where a library building remodel was recently completed. The second was hosted by the Brown Library at University of St. Francis in Joliet, where the staff discussed recent changes to staffing service desks. Both open houses included presentations by CARLI member librarians as well as tours of the facilities.

Resource List: Citations and Author Abstracts

MERGING/DISTRIBUTING LIBRARY SERVICE POINTS

Bunnett, Brian, Andrea Boehme, Steve Hardin, Shelley Arvin, Karen Evans, Paula Huey, and Carey LaBella. "**Where Did the Reference Desk go? Transforming Staff and Space to Meet User Needs.**" Journal of Access Services, vol. 13, no. 2, 2016, pp. 66-79. doi: ↗ 10.1080/15367967.2016.1161517.

Abstract: A sharp decline in the number of reference queries prompted the library administration at Indiana State University to begin a project to combine the circulation, reference, and IT desks to reduce staffing at a new consolidated service point. All faculty and staff in the reference/instruction and circulation units participated in the project. The new arrangement and subsequent removal of librarians from routine desk duties have expanded instructional opportunities, consistent with the university's goals. Project participants plan further assessments to better determine the impacts of the new service arrangement.

Dickerson, Madelynn. "**Beta Spaces as a Model for Recontextualizing Reference Services in Libraries.**" In The Library With The Lead Pipe, 18 May 2016,
↗ http://www.inthelibrarywiththeleadpipe.org/2016/reference-as-beta-space/.

Abstract: Reference services are at a crossroads. While many academic libraries continue to offer reference services from behind a desk, others are moving to roving and embedded reference models. Meanwhile, libraries are also engaged in the development of collaborative learning spaces—often rich with technology, such as makerspaces and learning labs—but these spaces are often removed from the reference services environment. Beta spaces are another type of collaborative environment used in both public and academic libraries with the potential to infuse energy into the reference space and emphasize research support through experimentation, collaboration, and user contribution. Beta spaces are user-oriented environments with a focus on innovation and experimentation, much like a makerspace but with an emphasis on ideas over technology. A beta space model for reference services would enhance opportunities for active learning, help make the research process visible and tangible, and effectively demonstrate the value of reference.

Hannan, Heather Groves. "**Great Expectations: (Re)Design Motivator for Merging Traffic at the Service Desk.**" The Future of Library Space, edited by Samantha Schmehl Hines and Kathryn Moore Crowe. Emerald Group, 2016, pp. 199-216. Advances in Library Administration and Organization, 36. ↗ https://www.emeraldinsight.com/doi/abs/10.1108/S0732-067120160000036009

Abstract: Purpose: Merging library traffic from dispersed service points into a combined services desk is not new, and many reasons prompt this move. George Mason University, Virginia's largest public research institution, combined a total of 10 service desks located in four libraries on three distributed campuses. To consolidate services and reduce costs, the Mason Libraries established a "one-stop" service point in each library. With the goal of "one-stop" service point in each facility, the Mason Libraries recrafted physical spaces, reviewed policies, procedures, and workflows as well as revised staff roles and responsibilities.

Jones, Phillip J., and Tim Zou. "**The Process and the Promise of Consolidating Public Services Desks: You Can't Hurry Love.**" Brick and Click Libraries Symposium Proceedings, 6 Nov. 2009, Northwest Missouri State University, pp. 4-14. http://d-scholarship.pitt.edu/5838/1/ED507380.pdf.

Abstract: Professional literature and anecdotal evidence from presentations at conferences indicate that the consolidation of public service, common in branch libraries and other small academic libraries, is being debated and implemented in some central libraries of larger institutions. The personnel of the University of Arkansas Libraries analyzed this emerging trend in 2008 while addressing new strategic goals. A task force of twelve supervisors ultimately recommended a centralized one-stop service desk in the main library, Mullins. Several major considerations guided the project: streamlining service to avoid the confusion of patrons and the ping-pong effect of referrals among multiple service points, and staffing personnel in a cost-effective manner. Open-minded and thorough brainstorming was critical to the task force's success. This paper discusses the rationale for the changes, explains the process of striving to build consensus across all functions within the Public Services Division, presents factors that led to the decision to relocate reference service to the circulation desk, and reviews the implementation in December 2008 and initial results.

Kiesling, Bruce L., and Claudene Sproles. "**Reviewing and Reforming Library Service Points: Lessons in Review and Planning Services, Building Layout, and Organizational Culture.**" Library Management, vol. 38, nos. 8/9, 2017, pp. 426-36.
↗ https://www.emeraldinsight.com/doi/abs/10.1108/LM-02-2017-0020.

Summary: This paper provides a process and framework for library leadership who are evaluating and revising service delivery models, and shows that comprehensive and ongoing user assessment is crucial to planning for renovations and service changes.

Lund, James R. "Service Desk Shuffle." The Bottom Line: Managing Library Finances, vol. 25, no. 1, 2012, pp.23-25, doi: ↗ 10.1108/08880451211229199.

Abstract: Purpose – The purpose of this article is to encourage public librarians to consider replacing two service desks with one. Design/methodology/approach – The author interacts with his experience of providing library services from a two-story Carnegie library and a multi-desk one-story library to make an argument for a single service desk. Findings – Providing one service point creates a seamless experience for patrons and necessitates teamwork from all service staff – professional and non-professional. Originality/value – Offers a "common-sense" perspective on providing reference and circulation services.

STAFFING AND TRAINING AT MERGED LIBRARY SERVICE POINTS

Chauvet, Marianne, Vicki Bourbous, and Frances Liston. "**Service Matters: Single Service Point as a Collaborative and Professional Learning Initiative for Service Excellence.**" Journal of Access Services, vol. 13, no. 2, April/June 2016, pp. 80-90. doi: 10.1080/15367967.2016.1161518.

Abstract: Changes and innovations in higher education learning and teaching acted as a catalyst for rethinking the way in which service was delivered to library clients at Australian Catholic University. The Single Service Point was piloted at one campus library in 2014 to develop a best practice approach to service delivery. The merging of cultures within the library environment was achieved through committed leadership, with staff agreeing on shared values and goals and applying the university mission. All staff were responsible for seeking solutions to challenges and becoming autonomous in their professional development and training. Overall, in a Single Service Point model, service efficiency, excellence, and quality increased through staff teamwork, contribution, and collaboration.

Moore, Margaret Eilene, Kathleen A. McGraw, and Julia Shaw-Kokot. "**Preparing Staff to Work at a Single Service Desk.**" Medical Reference Services Quarterly, vol. 20, no. 1, 2001, pp. 79-86. doi: 10.1300/J115v20n01_08.

Introduction: This column will describe approaches to staff training for a single service desk–the setting, background, service goals, training objectives, training plans, evaluations, and next steps. Given that the service center is our users' on-site and off-site gateway to the entire range of library resources and services, developing and implementing effective training has been the library staff's greatest challenge. Colleagues at other libraries that had previously adopted single service desks told us that training was critical to success and was a major challenge. Evaluations during the first year of operation have proved the need for ongoing training improvements, and it is expected that training will continue to be the number one challenge. We hope that our experiences will help others build staff training and development programs, regardless of the scope of services.

Murphy, Beverly, Richard A. Peterson, Hattie Vines, Megan von Isenburg, Elizabeth Berney, Robert James, Marcos Rodriguez, and Patricia Thibodeau. "**Revolution at the Library Service Desk.**" Medical Reference Services Quarterly, vol. 27, no. 4, 2008, pp. 379-93. doi: 10.1080/02763860802367870.

Abstract: This article will describe how a revolution in customer service provision beginning in 2002 has led to an evolution of library services. When the reference and circulation desks were merged to create a single service point, responsibilities were broadened, core competencies were developed, and staff members were cross trained. In 2005, an analysis of staffing and work patterns demonstrated a need to build upon the original model to better utilize staff and ensure coverage of the desk. Reference librarians were moved to "on call" status, technical services staff were added to the schedule, and core competencies and procedures were refined.

Oud, Joanne, and Peter Genzinger. "**Aiming for Service Excellence: Implementing a Plan for Customer Service Quality at a Blended Service Desk.**" Journal of Access Services, vol. 13, no. 2, 2016, pp.112-30. doi: 10.1080/15367967.2016.1161521.

Abstract: This article discusses a public service review and redesign that resulted in a blended service desk combining reference and circulation functions, staffed by nonlibrarians. The redesign implements a number of organizational structures that encourage service excellence, as found in the business literature and in examples of nonlibrary organizations that excel in customer service. The article identifies key organizational structures that have been shown to support or hinder good service and discusses the process of implementing these structures in practice and the results of an assessment process designed around determining success.

Venner, Mary Ann, and Seti Keshmiripour. "**X marks the Spot: Creating and Managing a Single Service Point to Improve Customer Service and Maximize Resources.**" Journal of Access Services, vol. 13, no. 2, April/June 2016, pp. 101-11. doi: 10.1080/15367967.2016.1161520.

Abstract: This article will describe how merging service points in an academic library is an opportunity to improve customer service and utilize staffing resources more efficiently. Combining service points provides libraries with the ability to create a more positive library experience for patrons by minimizing the ping-pong effect for assistance. The Access Services Department at the University of North Texas Libraries was charged with management of the circulation and reference services offered at the service desk. Streamlined planning and modernized management of the desk and its impact on customer service in a changing library environment will be discussed.

MERGED LIBRARY AND TECHNOLOGY SUPPORT SERVICE POINTS

Kimmell-Smith, Stacey E. "**Ten Years After: The Integrated Computing and Library Help Desk at Lehigh University.**" Internet Reference Services Quarterly, vol. 11, no. 3, 2006, pp. 35-55. doi: ↗ 10.1300/J136v11n03_03.

Abstract: In 1996, Lehigh University merged its libraries, computing, and telecommunications services into a single organization called Information Resources. As part of the merger, the frontline services–the computing support desk and the library reference desk–were combined into a single help desk designed to offer a single point of service, with backup by a second tier of computing, instructional technology, enterprise information, and library consultants. The author reviews the literature on the service implications of merging libraries and computing and provides an overview of the new organizational structure of Lehigh's Information Resources. The rest of the paper traces the development of the LTS (Library and Technology Services) integrated help desk over ten years and describes management issues such as training, staffing, referral, workflow, assessment, and other topics.

Magee, Christopher, and Michael Perini. "**The Blended Desk and its Consequences on Collaboration.**" Collaborative Librarianship, vol. 6, no. 3, 2014, pp. 124-29. ↗ https://digitalcommons.du.edu/cgi/viewcontent.cgi?referer=https://scholar.google.com/&httpsredir=1&article=1095&context=collaborativelibrarianship

Abstract: This article discusses the complications arising from the implementation of the "blended desk" model in an academic library and its influence on intra-organizational collaboration. Blended desks combine the physical spaces of traditional Circulation and Reference desks and staff in an arrangement with a new desk and multi-skilled individuals. Traditionally dissimilar mentalities and skill sets of the Circulation and Reference personnel along with a culture reflecting typical academic hierarchy all create impediments to the success of this service model. Given this, various reconsiderations of the blended desk model are suggested.

Wang, Bing, and Bruce Henson. "**Change is Coming: A Combined Services Area Project.**" Science & Technology Libraries, vol. 30, no. 1, January 2011, pp. 89-98. doi: ↗ 10.1080/0194262X.2011.545678.

Abstract: Many academic libraries are following the trend of combining reference and access services at a single service location. Here at the Georgia Institute of Technology Library and Information Center, we are working on a Combined Services Area Project to transform current service points into a one-stop-shop area that offers reference, circulation, and technology support services. This article details the processes involved in planning and implementing an integrated services desk, outlines the benefits and challenges discovered in the process, and sets the framework for developing a collaborative service model.

Wang, Bing, and Bruce Henson. "**A Combined Services Area Project: Strategies for a Successful Operation.**" Science & Technology Libraries, vol. 36, no. 3, 2017. doi: ↗ 10.1080/0194262X.2017.1365042.

Abstract: Since 2011, Georgia Tech Library has been undergoing a series of changes to redefine the 21st century research library. At the beginning of these changes were combining reference, circulation, and technology support into a one-stop-shop service model. Although operations under the integrated services model faced many challenges, forming a new department to include all staff members who provide such integrated services and helping these employees develop and maintain their competency are two key successful factors.

REFERENCE FUNCTIONS IN A MERGED ENVIRONMENT

Bandyopadhyay, Aditi, and Mary Kate Boyd-Byrnes. "**Is the need for mediated reference service in academic libraries fading away in the digital environment?**" Reference Services Review, vol. 44, no. 4, 2016, ↗ http://www.emeraldinsight.com/doi/full/10.1108/RSR-02-2016-0012.

Abstract: Academic libraries are experiencing numerous changes in their services due to high demands for digital resources and changes in users' information needs and expectations. Many academic library users give preferences to Google, Google Scholar and other search engines on the internet when they search for information. As reference transactions are decreasing in many academic institutions, this paper aims to investigate the continuing need for mediated reference services in the technology-driven environment in academic libraries.

Douglas, Arellano. "**A Reference Redo.**" ACRLog: Blogging by and for Academic and Research Librarians, 16 Jan. 2017, ↗ http://acrlog.org/2017/01/16/a-reference-redo/.

Summary: Instead of continuing on with business as usual, our library director gathered us together to discuss reference services at our library. It was an informal meeting, but I thought her discussion questions did a great job at getting to the core of why we provide reference services, what reference means to each of us, and how we could potentially be doing it differently.

Kenney, Brian. "**Where Reference Fits in the Modern Library: Today's Reference User Wants Help Doing Things Rather than Finding Things.**" Publisher's Weekly, 11 Sept. 2015, ↗ https://www.publishersweekly.com/pw/by-topic/industry-news/libraries/article/68019-for-future-reference.html.

Summary: The library today is still a trusted institution, but the public is coming to us with different expectations. Clinging to an outdated reference mission has left many libraries struggling to meet these new expectations.

LaMagna, Michael, Sarah Hartman-Caverly, and Lori Marchetti. "**Redefining Roles and Responsibilities: Implementing a Triage Reference Model at a Single Service Point.**" Journal of Access Services, vol. 13, no. 2, April/June 2016, pp. 53-65. doi: ↗ 10.1080/15367967.2016.1161516.

Abstract: As academic institutions continue to renovate and remodel existing libraries to include colocated services, it is important to understand how this new environment requires the redefining of traditional library roles and responsibilities. This case study examines how Delaware County Community College redefined reference and research service by transitioning to a triage reference model. This includes how information desk staff and student workers at a single service point determine when to refer users to librarians and how this model has evolved based on specific situations and experiences.

McClure, Hazel, and Patricia Bravender. "**Regarding Reference in an Academic Library: Does the Desk Make a Difference?**" Reference & User Services Quarterly, vol. 52, no. 4, Summer 2013, pp. 302-8. ↗ https://scholarworks.gvsu.edu/library_sp/47/

Abstract: Some academic libraries are consolidating their circulation and reference desks into single service points. The librarians at one academic library undertook a study to determine if such a consolidation would affect their reference service. They analyzed the number and type of questions asked during times when a librarian was physically present at the reference desk and compared it to the number and type of questions asked when a librarian was "on call" (not present at the desk, but available to be called to the service desk to answer reference questions) over a period of seven academic semesters. This article reports on the methodology used to collect and analyze the data and the researchers' findings. The results show that true reference questions remained steady whether or not the reference desk was staffed. The implications are important at a time when libraries are moving to single service desks staffed by nonlibrarians and are unsure of the efficacy of this model.

Meldrem, Joyce A., Lori A. Mardis, and Carolyn Johnson. "**Redesign Your Reference Desk: Get Rid of It!**" Paper presented at the 12th National Conference of ACRL, Minneapolis, MN, April 2005.
http://www.ala.org/acrl/sites/ala.org.acrl/files/content/conferences/pdf/meldrem05.pdf.

Abstract: This case study of a medium-sized academic library reports the evolution of reference service from a traditional reference desk to a two-tiered reference system to a "one-stop shopping" model of providing public service that eliminates a physical reference desk while maintaining service for walk-in patrons. A pilot project tested the feasibility of eliminating a physical desk for providing reference service. The project consisted of a review of literature, discussion and analysis, proposal, implementation, marketing, and assessment. The pilot project in this case study can be used as a model for other small-to-medium-sized academic libraries for eliminating a physical reference desk or as a springboard for considering other multi-tasking options when experiencing declining reference questions.

Schulte, Stephanie. "**Eliminating Traditional Reference Services in an Academic Health Sciences Library: A Case Study.**" Journal of the Medical Library Association, vol. 99, no. 4, October 2011, pp. 273-9,
https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3193369/pdf/mlab-99-04-273.pdf.

Abstract: How were traditional librarian reference desk services successfully eliminated at one health sciences library? The analysis was done at an academic health sciences library at a major research university. A gap analysis was performed, evaluating changes in the first eleven months through analysis of reference transaction and instructional session data. Substantial increases were seen in the overall number of specialized reference transactions and those conducted by librarians lasting more than thirty minutes. The number of reference transactions overall increased after implementing the new model. Several new small-scale instructional initiatives began, though perhaps not directly related to the new model. Traditional reference desk services were eliminated at one academic health sciences library without negative impact on reference and instructional statistics. Eliminating ties to the confines of the physical library due to staffing reference desk hours removed one significant barrier to a more proactive liaison program.

Su, Mila. "**Beyond Circulation: The Evolution of Access Services and Its Relationship to Reference Librarianship.**" (2008) The Reference Librarian, vol. 49, no. 1, 2008, pp. 77-86. doi: ↗ 10.1080/02763870802103795.

Abstract: Academic libraries have undergone a variety of organizational changes in the last two decades. One area that has evolvec out of these changes is access services. Relationships between circulation, interlibrary loan, and reference have been explored though informal and formal organizational structures. Because of these types of interactions it is feasible for reference librarians to consider positions in access services.

Thorpe, Clare. "**Engaging with Our Communities: Future Trends and Opportunities for Reference Services.**" Journal of the Australian Library and Information Association, vol. 66, no. 4, 2017, pp. 406-15. doi: ↗ 10.1080/24750158.2017.1359993.

Abstract: Libraries across the world are constantly reinventing themselves as they respond to changing community needs and the benefits and challenges posed by new and emerging technologies. This literature review was undertaken to inform a visioning and planning exercise in the Visitor Experience team at State Library of Queensland to identify opportunities and trends for the provision of engaging and relevant reference services. Four key themes are discussed in this review: changing community expectations and user behaviour, defining and measuring the impact of the modern library and reference services, offering flexibility in spaces and service delivery, and the roles of library staff and future skills sets. This review confirms that libraries, specifically reference and information services, remain in a unique position to support their communities in learning, work, recreation, creativity and innovation. The challenge for library leadership is to measure the impact of the library in their local community context.

Open Houses – New Service Models in Action

MILLIKIN UNIVERSITY – STALEY LIBRARY AND NEW UNIVERSITY COMMONS, MARCH 15, 2018

- Welcome, Overview of the Day, Planning for the University Commons
    - Jeffery Aper, Provost
    - Cindy Fuller, Director of Staley Library
    - Rachel Bicicchi, Associate Professor, Educational Technology Coordinator, and Research/Instruction Librarian
    - Sue Franzen, Chair, CARLI Public Services Committee
- New Technologies Studio Overview
    - Rachel Bicicchi, Associate Professor, Educational Technology Coordinator, and Research/Instruction Librarian
    - Eric McKinney, Educational Technology and Technical Services Specialist
- Instruction Program Overview
    - Dr. Matthew Olsen, Assistant Professor, Instruction Coordinator, and Research/Instruction Librarian
- Building/Library Tour
    - Cindy Fuller, Director of Staley Library
- Panel Discussion with all University Commons Stakeholders including:
    - Jessica Wilcoxen, Associate Professor and Chair, Arts Technology
    - Z. Paul Reynolds, Director of Student Development & University Commons
    - Carrie Pierson, Director of the Office of Student Success and ADA Coordinator
    - Cindy Fuller, Director of Staley Library
    - Judi Crowe, Director of the Writing Center and Assistant Professor of English
    - Molly Berry, Director of Inclusion and Student Engagement
- Presentation by Quincy University, Patricia Tomczak, Dean of Library and Information Resources, Quincy University

→ **Event Photo Gallery**

UNIVERSITY OF ST. FRANCIS – BROWN LIBRARY, APRIL 6, 2018

- "Shared Circulation & Reference Desk Experience at USF," Shannon Porhte Wenzel, Director of Brown Library, University of St. Francis
- Library Tour
- "Beta Desks and Planning for a New Service Model," Nancy Weichert, Instructional Services Librarian, University of Illinois at Springfield
- Discussion of Service Models

→ **Event Photo Gallery**

2017–2018 CARLI Resource Sharing Committee: Annual Report of Activities

Members

Belinda Cheek, 2017-2020, North Central College
Eric Edwards, 2016-2019, Illinois State Library, Co-Chair
Kelly Fisher, 2015-2018, Eureka College
Rand Hartsell, 2016-2019, University of Illinois at Urbana-Champaign
Lisa Horsley, 2017-2020, Abraham Lincoln Presidential Library and Museum
Thomas Mantzakides, 2016-2019, Morton College, Co-Chair
Sarah McHone-Chase, 2017-2020, Northern Illinois University
Amanda Roberts, 2017-2018, University of Illinois Springfield
Jennifer Stegen, 2015-2018, Loyola University Chicago
CARLI Staff Liaisons: Debbie Campbell and Lorna Engels

The Resource Sharing Committee met in person at the CARLI Office on Friday, July 28, 2017. All other meetings took place via conference call on the third Wednesday of every month (10:00-11:30 AM), with the exception of the December meeting, which was held via conference call on Wednesday, December 13 (10:00-11:30 AM).

Activities

- Sent out questions on the following topics to the CARLI Resource Sharing email list
  - Training student employees
  - Most common resource-sharing-related questions received from students around the beginning of the school year
  - Adjusting and reducing services during holidays and breaks
  - Promoting interlibrary loan services on campus
  - Changes in circulation policies over the past year
  - Workflow in reporting, and searching for, missing items

- Hosted two webinars
  - "New Tools in Resource Sharing: Keeping Up with the Changes"—presented by Kevin O'Brien, University of Illinois at Chicago Library of the Health Sciences, on November 9, 2017
  - **"Using Data to Assess and Communicate Improvements in Resource Sharing"—presented by Andy Meyer, North Park University, on March 29, 2018**

- Presented on the Committee's 2016-2017 annual project ("ILLINET Interlibrary Loan Traffic Survey Analysis: FY2012-FY2016") at the Illinois Library Association Annual Conference (October 12, 2017) and the CARLI Annual Meeting (November 17, 2017)

- Planning a Fall Forum, on resource-sharing topics, that will take place at the Abraham Lincoln Presidential Library and Museum in Springfield on October 25, 2018; distributed survey to Resource Sharing email list to gain feedback on what topics would interest potential attendees

- Annual Project: “Ways in Which ILL Usage Influences Collection Development Policies and Practices in CARLI Libraries”
    - Incorporated results of a survey, on how libraries use interlibrary loan statistics to inform collection development that the Committee distributed to the Resource Sharing listserv
    - Included three examples of individual libraries’ workflows
    - Compiled an annotated bibliography, consisting of 29 articles and six books, for further reference
    - The final version of the annual project is available on the CARLI website: https://www.carli.illinois.edu/products-services/i-share/circ/ILLUsageCollDevel

Completed Terms

Kelly Fisher, Amanda Roberts, and Jennifer Stegen will rotate off the Committee on June 30, 2018. Also, Lisa Horsley, whose term lasts until 2020, has chosen to leave the Committee at the end of June, since she is moving to a position that does not involve resource-sharing responsibilities. The Committee will select a new Chair or Co-Chairs at its final meeting of the year, on June 20.

2017–2018 CARLI Resource Sharing Committee Annual Project: Ways in Which ILL Usage Influences Collection Development Policies and Practices in CARLI Libraries

Introduction & Overview

The CARLI Resource Sharing Committee for 2017-18 consists of the following members: Debbie Campbell (CARLI Staff Liaison), Belinda Cheek (North Central College), Eric Edwards (Co-Chair, Illinois State Library), Lorna Engels (CARLI Staff Liaison), Kelly Fisher (Eureka College), Rand Hartsell (University of Illinois at Urbana-Champaign), Lisa Horsley (Abraham Lincoln Presidential Library and Museum), Thomas Mantzakides (Co-Chair, Morton College), Sarah McHone-Chase (Northern Illinois University), Amanda Roberts (University of Illinois at Springfield), and Jennifer Stegen (Loyola University Chicago). Our annual project for 2017-18 analyzes **the ways in which interlibrary loan (heretofore referred to as ILL) usage influences collection development policies and practices in CARLI libraries**. Our work on this project focuses on interlibrary loan and resource sharing activities for returnable items in Illinois academic libraries. The Committee conducted a literature review and found that current literature on Illinois-specific resource sharing practices were not readily available. We then decided to focus on the data provided by academic libraries in Illinois through a survey sent out to the CARLI Resource Sharing listserv in March 2018.

We analyzed data provided by 69 responding CARLI libraries to understand how interlibrary loan statistics impact the decisions made when purchasing materials for a collection. This analysis will be useful for libraries wishing to address resource/budget allocation, library policy review, collection justification, and example workflow documentation. Some of the information collected from the survey included: the different ways libraries use ILL data/statistics to influence collection development, whether ILL based purchases are prioritized based on patron status, and methods used to assess successful use of purchased ILL materials. We also included case studies of three CARLI institutions--Loyola University Chicago, the University of Illinois at Urbana-Champaign, and the College of DuPage--to better illustrate the means/methods utilized by specific libraries in employing ILL statistics to make collection development decisions, including implementing a Patron-driven acquisitions model (PDA) program.*

For those interested in greater detail on this subject, we have included an annotated bibliography of articles and a list of book recommendations that reflect a variety of ways in which ILL usage influences collection development.

**For the purposes of this study, we are using the following definition for PDA:*

"Patron-Driven Acquisitions (PDA) refers to a formal plan or program where librarians develop criteria for selecting books that will be bought based on patrons' requests of use." - Ward, S. M. (2012). Guide to Implementing & Managing Patron-Driven Acquisitions. Chicago, IL: American Library Association.

CARLI Membership Survey

The committee decided that an online survey sent to CARLI libraries would be the best way to obtain information on how these libraries were using ILL data to influence collection development.

Because the project involved aspects of collection development, our committee contacted CARLI's Collection Development Committee to make sure we weren't covering similar topics that they would be addressing in their work. Once that was clarified, committee members drafted potential survey questions that were added to a Google Doc for review and discussion. The final questions were selected by member vote. A sub-committee was then formed to refine the wording of the questions and to review definitions of the term "Patron Driven Acquisitions" and its variants.

After working on the questions, a concern was expressed that a series of short answer questions would lead to a low response rate. Most of the questions were then converted into multiple choice responses with the option of a follow-up phone call for more details. The names of the respondents to the survey questions were to be kept anonymous.

Seven questions were ultimately selected, and on March 9th, a link to the survey on SurveyMonkey.com was sent out to a listserv used by CARLI staff members to exchange information about resource sharing practices. The survey was kept open for one month to account for potential library closures during spring breaks across the consortium. An emailed reminder to take the survey was sent out on March 26th.

Of the total number of CARLI libraries, 51% responded to the survey, yielding a total of 69 responses.

The charts below are meant to visualize the data.

(See Appendix for list of survey questions):

Library Departments of Respondents

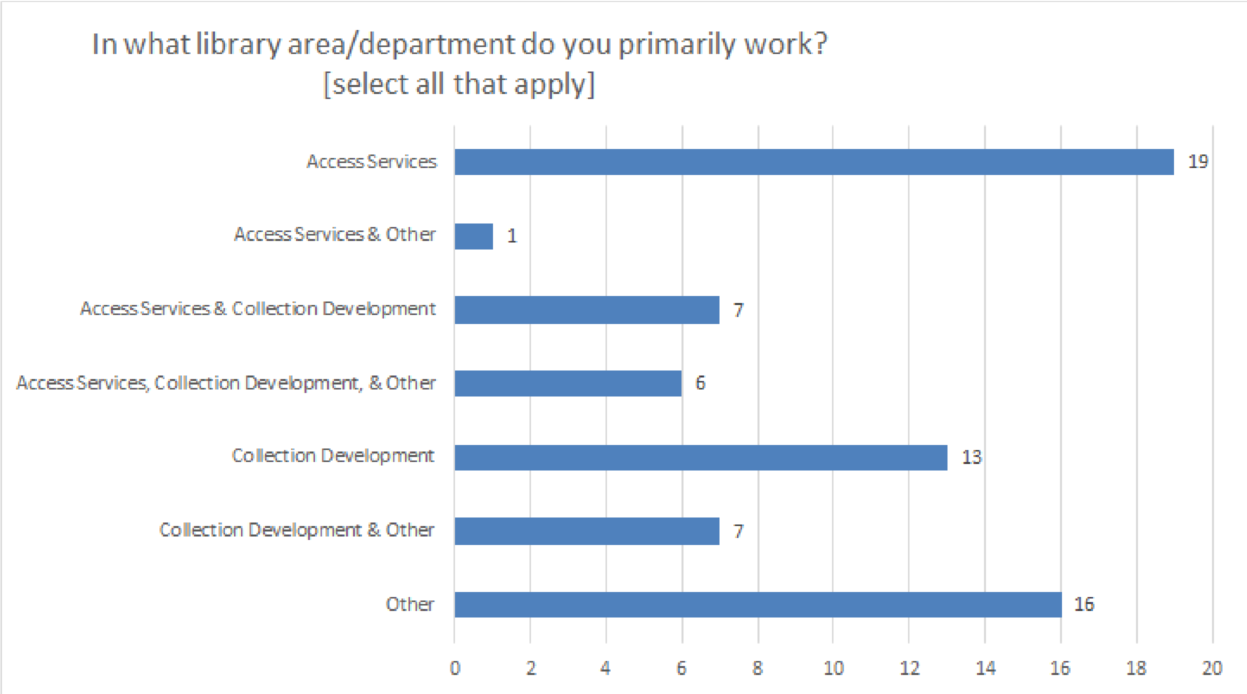

Figure 1:

This chart summarizes the background of the 69 survey respondents, who were asked to choose all applicable options. The most popular category, with 19 respondents, or 28%, was Access Services, which we define as Interlibrary Loan, Circulation, and other such library functions. Surprisingly, the second most popular category was "Other." Respondents in this category performed duties in Library

Administration, Archives, Technical Services, Instruction--tasks performed throughout the library, either in conjunction with Access Services or Collection Development, or on their own.

Frequency of Statistical Use

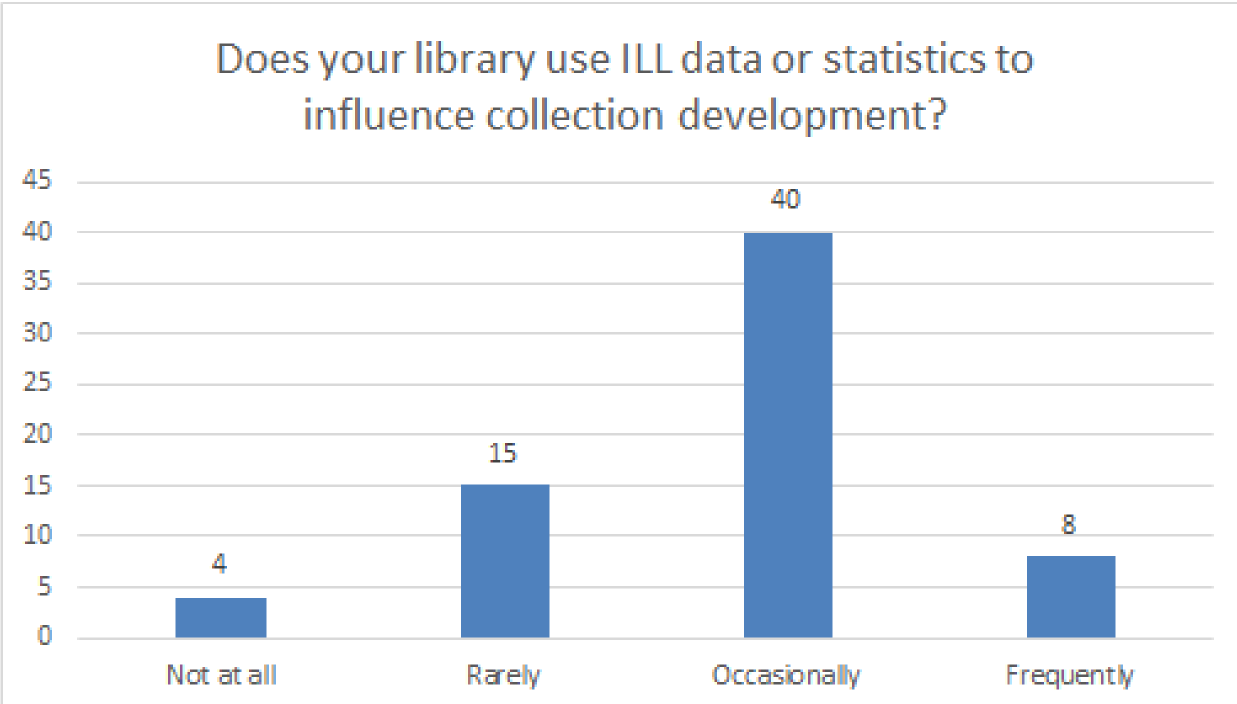

Figure 2:

Of the 67 respondents to our survey question about whether their library uses ILL data or statistics to influence collection development, 48 of them, or about 72%, indicated that they did "Occasionally" or "Frequently," with the greater number of those leaning towards "Occasionally." Only 4 respondents, 6%, do not use ILL data or statistics at all in making their collection development decisions.

Frequency of Statistical Use by Library Department of Respondent

Summary for Chart	Response	Count of Responses
Access Services	Frequently	1
Access Services	Occasionally	11
Access Services	Rarely	5
Access Services	Not at all	2
Access Services & Collection Development	Frequently	1
Access Services & Collection Development	Occasionally	4
Access Services & Collection Development	Rarely	2
Access Services & Other	Occasionally	1
Access Services, Collection Development, & Other	Frequently	1
Access Services, Collection Development, & Other	Occasionally	2
Access Services, Collection Development, & Other	Rarely	1
Access Services, Collection Development, & Other	Not at all	2
Collection Development	Frequently	1
Collection Development	Occasionally	8
Collection Development	Rarely	4
Collection Development & Other	Frequently	1
Collection Development & Other	Occasionally	3
Collection Development & Other	Rarely	2
Collection Development & Other	Left Blank	1
Other	Frequently	3
Other	Occasionally	12
Other	Rarely	1

Figure 3:

The 69 survey respondents work in a variety of library departments, with “Access Services” and “Other” being the most common (see Figure 1), and, for the most part, they use interlibrary data or statistics only occasionally to make collection-development decisions (see Figure 2). Looking at how often each department uses these statistics, none of them stands out as using them either “Frequently” or “Rarely.” The “Occasionally” category is the most popular across departments, although the category sees higher use in departments that work by themselves, as opposed to collaboratively. Perhaps these departments that work more collaboratively are more likely to have access to statistics, by virtue of pooling their resources. Conversely, however, the “Not at all” category applies not just to “Access Services” alone, but also to “Access Services, Collection Development, & Other,” whereas one would expect wide cross-departmental collaboration to result in a greater use of statistics.

Purchase on Demand Projects

Selected survey responses about PDA (not using participants' names/institutions):

- Titles borrowed combined with title frequency on syllabi;
- I review titles that are being borrowed to determine if they are gaps that we want to fill or material outside of our collection areas;
- I haven't seen any reports on my institution's ILL data in awhile, but in the past when I have seen it, I would consider purchasing items that seemed to be borrowed ;
- At our institution, we run quarterly ILL reports by LC call# for the subject specialists so they can determine where there are gaps in our collection. We also have a Purchase on Demand service for our faculty through ILL. A quarterly report for Purchase on Demand requests is provided for the library administration and subject specialists. The report includes the faculty member and department the books were purchased for Methodologies for Using ILL Data/Statistics for Collection Development.

Other Ways ILL Data/Statistics Influences Collection Development

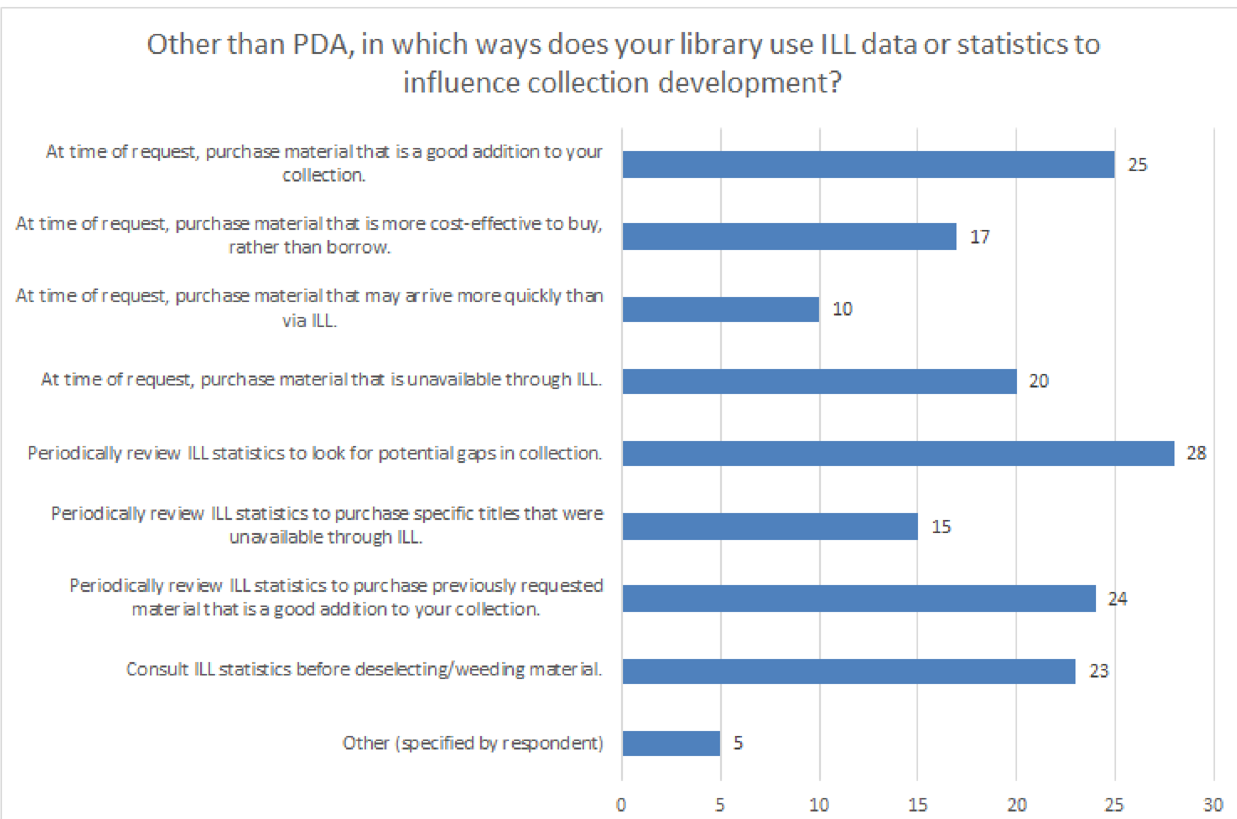

Figure 4:

Our survey asked respondents in what ways they used ILL data or ILL statistics to inform their collection development decisions. The 69 respondents were asked to choose all applicable options. The most popular use of ILL statistics was a periodic review to look for potential gaps in the collection, followed by using such data at the time of request to purchase titles that would make a good addition to the collection, reviewing ILL statistics periodically to purchase previously requested items that would make a good addition to the collection, and reviewing ILL statistics before deselecting/weeding. The few “Other” responses indicated using ILL data when deaccessioning print journals, using I-Share data specifically to make selection and deselection decisions, and using ILL statistics to decide on embargoed journal subscriptions that are not included in subscription packages.

Prioritization of Requests Based on Patron Status

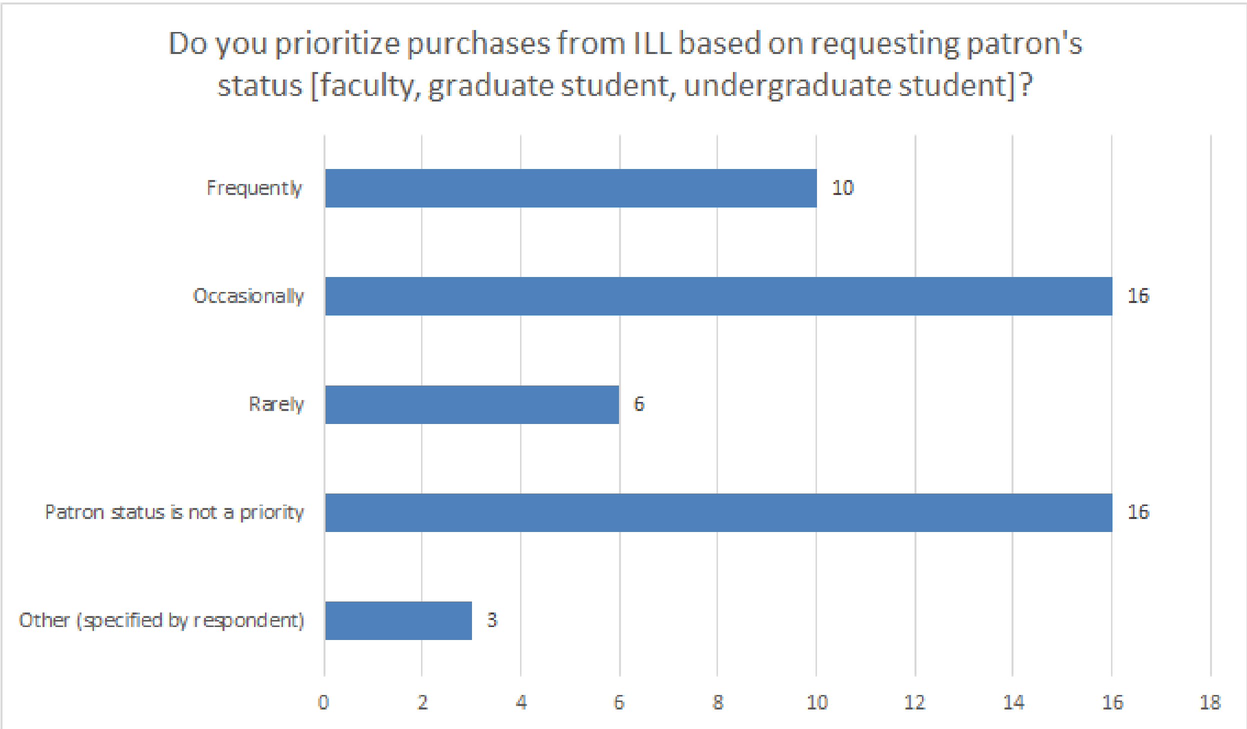

Figure 5:

The 51 responses to this question indicate that patron status either is not a priority or is occasionally a priority for most of the respondents. The three “Other” replies indicate not purchasing ILL items for patrons, prioritizing purchases for current Illinois State government employees, and a response that was unsure whether or not patron status influenced the prioritization of a purchase from ILL.

Prioritization of Requests Based on Patron Status, Subdivided by Institution Type

Type of Institution	Priority	Count of Responses
Community College	Occasionally	4
Community College	Rarely	2
Community College	Patron status is not a priority	5
Private	Frequently	9
Private	Occasionally	10
Private	Rarely	4
Private	Patron status is not a priority	7
Private	Other: Uncertain	2
Public	Frequently	1
Public	Occasionally	2
Public	Patron status is not a priority	4
Public	Other: Occasionally	1

Figure 6:

The purpose of this table is to determine, from the data, whether patron status takes on a greater role in prioritizing requests at four-year colleges and universities (including some that may grant graduate, doctoral, and other advanced degrees) than at community colleges. The "Frequently" category applies to just the four-year-and-above institutions. This would be expected, as community colleges generally do not have as strict a hierarchy among faculty, staff, and students that would require prioritizing certain requests. Comparing the private and public colleges, patron status has a greater impact at the private ones, with 19 out of 32 responses (59%) falling into either the "Frequently" or "Occasionally" categories. At the public ones, the proportion is just 38%.

Assessment Methods

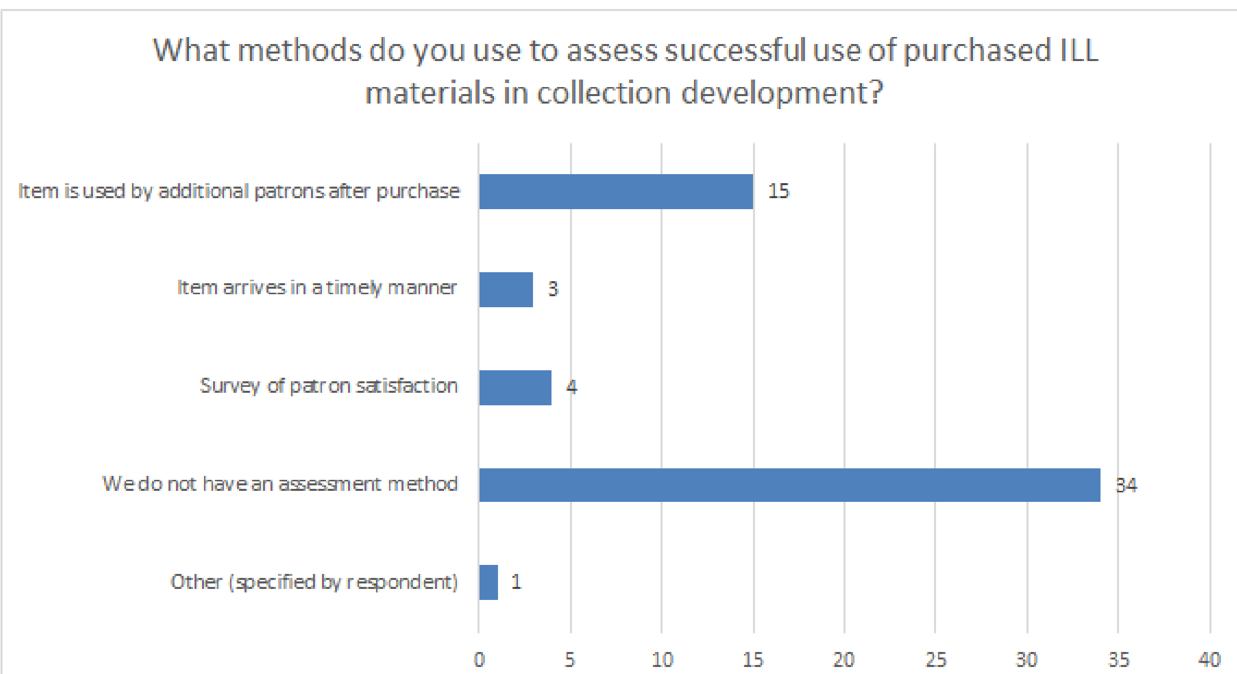

Figure 7:

Of the 57 respondents to this question, a majority of 34 of them, or 60%, indicated that they had no assessment method for determining the successful use of purchased ILL materials in collection development. The one "Other" response did not elaborate.

Example Workflows at CARLI Member Libraries

What follows are examples of interlibrary loan and collection development workflows from CARLI member libraries, public and private, used to demonstrate how they provide services to their users in the most efficient manner possible. Loyola University Chicago is a private Jesuit university with an enrollment of around 16,000 students. The University of Illinois at Urbana-Champaign is a large public university with approximately 45,000 students. The College of DuPage is a two-year community college with an enrollment of around 28,000.

Loyola University Chicago

Loyola University Chicago has been providing a Purchase on Demand (POD) service for its faculty members for many years. The POD service is a collaboration between interlibrary loan, access services, the subject specialists, acquisitions, cataloging, and the administration. The service was first initiated to assist with filling in the gaps within the library's collection, especially when purchasing a book is more cost-effective than requesting it through interlibrary loan. Set criteria is followed to assist in the decision to purchase a book. Specifically, is the book suitable for the collection? Is it under a certain price? Was it published within the last 15 years? Finally, is it available for immediate shipping through Amazon Prime?

Loyola University faculty members have the opportunity, via a form in ILLiad, to tell the library whether they recommend a book for purchase or not. Once the form has reached the ILL librarian, the librarian then reviews the request and determines if the book qualifies to be purchased. Acquisitions places the order for the book and then gives it to cataloging for rush processing. Access services then places the book on hold for the patron. Average turnaround time for POD is 5-7 days.

The POD service is promoted by the subject specialists and also at the "New Faculty Orientation" at the beginning of the academic year. Open communication and support from all of the departments involved is key to its success.

University of Illinois at Urbana-Champaign

The Library at the University of Illinois at Urbana-Champaign (UIU) comprises more than 20 distinct circulating collections and several special collections. The Oak Street High Density Storage facility and the Main Stacks hold over half of the collection. The library serves 53,000 students, faculty, and staff. The collections budget encompasses 400 subject funds (and a fund for new releases) totalling about $17 million in 2017, with over half of that used for online resources.

Interlibrary loan usage data exerts some influence on collection development at UIUC. Some PDAs are driven by unfilled I-Share requests, or when patrons request items that have yet to be purchased.

Some purchase decisions are made based on whether it's more cost-effective to acquire an item than it is to borrow through interlibrary loan. Occasionally items are acquired that are unavailable through interlibrary loan.

Periodically, collections development committee members review ILL statistics to identify potential gaps in the collection and to help identify areas of the collection that may benefit from deselecting or weeding.

In 2009 CARLI and UIUC undertook a joint project to test PDA for print monographs. Data showed very high title overlap. UIUC and CARLI began with a pool of $20,000, and loaded 6,000 records, selecting from a large record set. The pilot ran out money in five weeks because of the high demand. PDA items circulated at a higher rate than items purchased with other funds.

College of DuPage

COD doesn't use ILLiad nor any similar software program. All requests are mediated by ILL staff. This goes for requests sent directly to Worldshare as well as those coming through forms sent to the ILL email address. The ILL department keeps a running record of all ILL statistics, including all submitted requests, received through to returned, as well as any issues that prevent the requests from being processed, finding that keeping such statistics is much more accurate than reports coming from OCLC. A new report is created every month from these statistics, which is passed along to the librarians. This report will not show items that were at COD or available through I-Share, or duplicate requests from the same patron. The top of the new report includes a breakdown of patron type, type of library that filled the request, and whether it was from in- or out-of-state. An annual report is also created with basically the same information.

COD creates lending reports as well, and the same goes for I-Share, which is used for both lending and borrowing. For borrowing reports COD uses the ubstat_3_cod_mmyy_for_import.txt and the ubstat_5_cod_mmyy_for_import.txt CARLI reports. These reports are useful to the librarians for collection development purposes by demonstrating what has received the most requests, and they also show the historical number of charges, which is useful for deselection/weeding. For lending COD uses the Call_Slips_Filled_Requests and Call_Slips_Unfilled_Requests reports, which are also used for collection development and deselection/weeding decisions.

We do something similar for article requests. The report created for librarians includes the journal titles with the year in question. Some of these titles will show up multiple times which is of importance to librarians when discussing journal and database purchasing. Journals that find no lenders is most often due to embargos, which may encourage librarians to purchase the title if there are enough requests.

Conclusion

We hope this analysis provides useful data/examples to CARLI libraries in determining how Interlibrary loan statistics are used when making decisions on collection development. Survey data from 69 CARLI libraries provide a balanced representation of respondents from both the Access Services and Collection Development worlds, with 47.8% of respondents working in at least one area of Access Services, and the same percentage of respondents working in at least one area of Collection Development. A majority of respondents (72%) also report that their libraries occasionally or frequently utilize ILL data to make purchasing decisions for their library collections; the example from the College of DuPage demonstrates how libraries have implemented workflows to help them in this regard.

A "Purchase on Demand" program allows libraries to use ILL data to inform collection development. The example provided by the Loyola University Library demonstrates some of the workflows that may be used when implementing such a program. Excluding "Purchase on Demand," the most frequent use of ILL data to inform collection development is to identify gaps in the collection based on the material requested. Most libraries either do not prioritize a patron's status when making purchasing decisions based on ILL activity, or do so only occasionally.

The majority of respondents (60%) indicated that they have not implemented formal assessment methods to measure the efficacy of using ILL data to influence collection development. While it is not clear if this is due to a lack of time or resources, the training or hiring of staff with the appropriate data assessment skills would undoubtedly help libraries make better decisions in the efficient use of funds in meeting user demand.

Trends in the data encourage further investigation into these possible connections:

- Collection evaluation based on Interlibrary Loan usage/statistics
- Changes in patron resource needs
- Hiring qualified library staff with data assessment skills, or investing in training staff on acquiring such skills for professional development.
- Cost effectiveness of purchase vs. borrowing material
- The availability of open access content and full text databases

Further Reading Annotated Bibliography

Each of the articles below address ways in which interlibrary loan usage influences collection development policies or practices in libraries. If you are interested in reading articles with a common theme, you can look for any of the following tags at the end of each citation: **POD/PDA** (purchase on demand/patron-driven acquisitions)**, Serials, Monographs, Collection Analysis, ILL Data Analysis, Departmental Collaboration**

Allen, M., Ward, S.M., Wray, T., & Debus-Lopez, K.E. (2003). Patron-focused services in three US libraries: Collaborative interlibrary loan, collection development and acquisitions. *Interlending & Document Supply, 31*(2), 138-141. **Tags: Monographs, Departmental Collaboration**

This article describes the ILL/acquisitions collaborative models for purchases initiated through patrons' interlibrary loan requests at three libraries in 2001-2002: the Thomas Crane Public Library (TCPL) in Quincy, Massachusetts, Purdue University in West Lafayette, Indiana, and the University of Wisconsin-Madison Memorial Library. Each library's workflow, criteria for selection, and subsequent analysis of titles selected through the collaborative Acq/ILL program is included. The authors conclude that patron satisfaction with the programs was high, the majority of materials selected for purchase by the ILL librarians did meet the collection development goals for the subject area, and the materials had higher subsequent usage than traditionally-selected materials.

Anderson, K.J., Freeman, R.S., Herubel, J.V.M., Mykytiuk, L.J., Nixon, J.M., & Ward, S.M. (2010). Liberal arts books on demand: A decade of patron-driven collection development, part 1. *Collection Management, 35*(3-4), 125-141. **Tags: POD/PDA, Monographs, Departmental Collaboration**

In January of 2000, Purdue University Libraries began a service they called "Books on Demand." Interlibrary loan requests for books meeting a set criteria were purchased for their collection rather than borrowed from another library. This article from 2010 is the first of three articles to review the effectiveness of this program. As the title indicates, this article focuses on books that were requested from the liberal arts disciplines. The review found that the patron population that used this service most heavily was graduate students, and the conclusions indicated that this service added an important avenue for this group to give input to their collection development. There were six liberal arts departments that represented the largest proportion of purchases, but they noted that the selections were very cross-disciplinary. They also reviewed the titles purchased and felt that the vast majority of the selections were appropriate for their collections.

Bracke, M.S. (2010). Science and technology books on demand: A decade of patron-driven collection development, part 2. *Collection Management, 35*(3-4), 142-150. **Tags: POD/PDA, Monographs**

In January of 2000, Purdue University Libraries began a service they called "Books on Demand." Interlibrary loan requests for books meeting a set criteria were purchased for their collection rather than borrowed from another library. This article from 2010 is the second of three articles to review the effectiveness of this program. This article looks at books requested in support of the science and technology disciplines. 1,557 books purchased through this program were reviewed as science and technology titles. The reviewer determined that just 4% of these purchases were not appropriate for a research collection. Many of the titles were determined to be interdisciplinary, serving either multiple science disciplines or bridging science and one of the social science disciplines. All but 17% of the requests circulated beyond the original interlibrary loan requester, and 36% had circulated 5 or more times. In addition to helping build an interdisciplinary collection, these purchases also helped identify emerging areas of study in science and technology fields.

Bronicki, J., Ke, I., Turner, C., & Vaillancourt, S. (2015). Gap analysis by subject area of the University of Houston main campus library collection. *Serials Librarian*, *68*(1-4), 230-242. **Tags: Monographs, Collection Analysis**

The University of Houston, Main Campus Library performed a 2-phase evaluation of their collection with the goal of understanding the usage of the current collection and to identify gaps. This article reports on phase 1 of the process, which dealt only with print monographs (no e-books) with assigned call numbers. They analyzed the current distribution of their collection by LC class and subject area, overall usage of the collection, compared the age of the collection to usage, and analyzed the usage of the collection in comparison to ILL borrowing for the area. They used a value they called the RBH, or Ratio of Borrowing to Holdings, to make it easier to compare the percentage of requests to the collection. They compared the holdings to the ILL use for each class/subclass to determine overall user demand for each subject area and came up with collection levels:

Collection overuse & ILL underuse: collection is meeting needs

Collection overuse & ILL overuse: demonstrated demand; consider purchasing

Collection underuse & ILL underuse: little demand

Collection underuse & ILL overuse: demonstrated demand; consider purchasing

Campbell, S.A. (2006). To buy or to borrow, that is the question. *Journal of Interlibrary Loan, Document Delivery & Electronic Reserves, 16*(3), 35-39. **Tags: Monographs, ILL Data Analysis**

Based on an ALA presentation in 2002, the Washoe County Library System developed a trial of purchasing some titles based on a specific set of criteria rather than interlibrary loaning the items. Usually the items purchased were unavailable through conventional interlibrary loan, thus providing patron satisfaction as well as adding relevant items to the collection. The average cost of purchase compared closely to the cost for providing the item through interlibrary loan. The circulation record was followed on the purchased items showing an average of 7 circulations per title. More research is needed to determine the long term effect of purchasing on interlibrary loan activity.

Chan, E.K., Mune, C., Kendall, S.L., & YiPing, W. (2016). Three years of unmediated document delivery: An analysis and consideration of collection development priorities. *Medical Reference Services Quarterly, 35*(1), 42. doi:10.1080/02763869.2016.1117288 **Tags: Serials, Collection Analysis, ILL Data Analysis**

Unmediated document delivery offers many advantages, including providing articles within a short turnaround time and granting access to materials that might otherwise be unavailable due to embargoes. One such delivery service that the Copyright Clearance Center has made available to libraries in recent years is Get It Now. San Jose State University's library, which began using the service in 2012 for a patron-driven, unmediated document delivery service, tracked its effectiveness over the first three years (through 2015). San Jose State saw a steady increase in use over the three years. Nonetheless, budget restrictions may make use of the system prohibitive to many institutions, as the article notes.

Foss, M. (2008). Books-on-demand pilot program: An innovative "patron-centric" approach to enhance the library collection. *Journal of Access Services*, *5*(1/2), 306-315. **Tags: POD/PDA, Collection Analysis**

This article reports on the flat collection budget at the University of Florida Libraries over several years, even as new degree programs were added. Because of this situation, ILL services at the library saw an increase in their requests. Keeping cost-per-transaction in mind, a pilot program was launched to determine if it would be more cost-efficient to purchase materials outright rather than request them. Such decisions would be made with a "patron-centric" focus and certain parameters were set up under which materials would be purchased, including from where, how, and what statistical information would be kept. After several months, purchases were examined, and parameters were reassessed in order to assure that all subjects were being treated on an equitable basis. The article describes the workflow for purchasing the materials, and also discusses what the benefits of this program were to the collection during an otherwise difficult time. Upon evaluation of the service, it was noted that patron satisfaction was generally high, the materials in question tended to circulate more often (based on previous studies), and it is primarily used by graduate students. The article ends with recommendations for changing the program, including expanding the options for possible vendors.

Fountain, K.C., & Frederiksen, L. (2010). Just passing through: Patron-initiated collection development in northwest academic libraries. *Collection Management, 35*(3-4), 185-195. **Tags: POD/PDA, Collection Analysis**

This article analyzes survey results regarding purchase on demand (POD) programs that were given by an academic library consortium that contains 36 academic libraries in Washington and Oregon. The authors argue that an interlibrary loan transaction does nothing for permanent collection building however the data from that request can help fill collection gaps. Of the 36 libraries surveyed, only 7 are currently using a POD program. The libraries that are not cited funding as the reason. The 7 libraries have a parallel workflow in how they process an ILL request turned POD. This workflow can easily be adopted by the remaining libraries in the consortium provided they feel they have the funding to start a POD program.

Gee, C.W. (2014). Book-buying through interlibrary loan: Analysis of the first eight years at a large public university library. *Journal of Interlibrary Loan, Document Delivery & Electronic Reserves*, *24*(5), 133-145. **Tags: POD/PDA, Collection Analysis, ILL Data Analysis, Departmental Collaboration**

A patron-driven acquisition (PDA) service, especially for materials that are relatively new and can be difficult to obtain through interlibrary loan, is an alternative for libraries that have adequate funding and the means to track use of the program. The main advantage of such a program to patrons is that they will not have to wait as long to receive an item and can also keep it longer. East Carolina University chose to track the first eight years of a PDA service, from 2006 to 2014. Despite some challenges, the program did see extensive use of the purchased materials including beyond just the initial patron request.

Hendler, G.Y., & Gudenas, J. (2016). Developing collections with Get It Now: A pilot project for a hybrid collection. *Medical Reference Services Quarterly*, *35*(4), 363. doi:10.1080/02763869.2016.1220751 **Tags: ILL Data Analysis, POD/PDA, Collection Analysis, Serials**

In this article, the authors describe why and how the Copyright Clearance Center's "Get It Now" service was implemented at the Loyola University Chicago Health Sciences Library. The journal authors were interested in comparing the costs of purchasing licenses for continued journal access vs. simply paying for single use of unsubscribed content through "Get It Now." For collection development purposes, the data collected was helpful in showing the type of material that users are requesting while a three-year review of interlibrary loan data "provided additional information about collection gaps" that helped the Library select 103 titles for unmediated access in "Get It Now." Interlibrary Loan data was used to help select material for the "Get It Now" pilot project, although more of the focus is on the cost-effectiveness of "just-in-time" purchases of licensed content in comparison to ongoing subscriptions for expensive journals that libraries maintain "just in case" a user needs an article.

Hodges, D., Preston, C., & Hamilton, M.J. (2010), Patron-initiated collection development: Progress of a paradigm shift. *Collection Management, 35*(3/4), 208-221. https://kb.osu.edu/dspace/bitstream/handle/1811/49773/1/HodgesD_CollectionManagement_2010_v35_n3-4_p208-221.pdf **Tags: POD/PDA, Collection Analysis**

This article examines the shift from librarian-mediated collection development to patron-initiated collected development and the issues that impacted the change. To illustrate this shift, the example of programs at the Ohio State University Libraries (OSUL) is used. Post WWII, OSUL approached collection development on a just-in-case basis, whereas that gradually changed over time as the economy tightened and sensibilities evolved. OSUL began to use more of a just in time model in 1990. The ILL unit was incorporated into Acquisitions and they began to experiment with the purchasing of titles, if it were faster and cheaper, rather than the ordering of them through traditional ILL. OSUL developed a Purchase on Demand program and developed formal parameters in 2008. OSUL also began using ebrary in 2008 which allowed patrons to trigger purchases there as well, within certain parameters. A second test of ebrary moved from mediated to unmediated. The data revealed by these tests are examined and discussed. The article ends with a description of how subject librarians have received the program and how collection development and patron-driven acquisition can work together in the future.

Huang, D.L. (2016). Flipped interlibrary loan (F.I.L.L.): Putting interlibrary loan in the driver's seat of acquisitions. *Journal of Interlibrary Loan, Document Delivery & Electronic Reserves, 25*(3-5), 61-74. **Tags: POD/PDA, Monographs, Departmental Collaboration**

This article discusses Lehigh University's pursuit of "Flipped Interlibrary Loan" or F.I.L.L. The library believes that ILL can and should inform permanent acquisitions for their library collection. Their purchase-on-demand program began in 2016 using an ILLiad software add-on called GIST (Getting It System Toolkit). Faculty members would request items through the GIST web form as part of their "Express Purchase" program. Items would then go through a librarian approval process based on established criteria before being ordered through Amazon Prime and rush cataloged. An important component noted was an automated email system which kept faculty members updated on the status of their request until it was available for pick-up. Items ordered through Express Purchase had a 91% circulation rate (as opposed to the 16.62% average of their other non-on-demand acquisitions plans). Even though the cost of an ILL circulation was less expensive ($17.50 vs. $82.60), by the fourth circulation, an express purchase was more cost-effective ($17.50 vs. $10.34). The added benefits of the express purchase were faculty satisfaction with around a 5-day turnaround, ease of renewal, and extended duration of checkout. ILL staff members also felt more empowered making decisions on items to refer to Acquisitions outside of express purchase since a successful collaborative relationship had been established.

Imamoto, B., & Mackinder, L. (2016). Neither beg, borrow, nor steal: Purchasing interlibrary loan requests at an academic library. *Technical Services Quarterly*, *33*(4), 371-385. **Tags: POD/PDA, Serials, Monographs, Departmental Collaboration**

This article discusses the "Next Generation ILL" pilot to live projects at the University of California, Irvine. UCI conducted three monograph-based pilots from 2010-13 where they purchased ILL titles that had previously gone unfilled in lieu of sending them out for a second attempt at filling for minimal to no charge. In the first pilot, staff both requested items via ILL and purchased them and compared the delivery times and costs of traditional ILL to Next Gen ILL for faculty monograph requests, finding that the Next Gen ILL's cost was only 17.5% higher than the cost to borrow from another library. In the second pilot, staff only purchased monographs requested as ILLs for faculty, which were then processed and circulated to the faculty. When returned, they were treated as gifts and reviewed by bibliographer and 81% were added to the permanent collection. In the third pilot, e-books were added and made the preferred format if available. The requests from faculty and now graduate students were purchased and books were automatically added to the collection (no longer reviewed as gifts). A fourth patron demand-based pilot was the addition of an article Pay Per View service with Reprints Desk serving as the vendor. The average article price was $34 with a $5.85 service charge. The average turnaround time from ILL staff request through the service to deliver was just 36 minutes. UCI considered their efforts to "create a way that [they] can quickly, and as cheaply as possible, purchase ILL requests that [their] ILL department could not easily borrow" a success.

Knievel, J., Wicht, H., & Connaway, L.S. (2006). Use of circulation statistics and interlibrary loan data in collection management. *College & Research Libraries*, *67*(1), 35-49. **Tags: Monographs, Collection Analysis, ILL Data Analysis**

This article reports a study at the University of Colorado at Boulder that looked at usage statistics of their English-language monograph collection. The usage statistics they gathered included both circulation statistics as well as interlibrary loan data. Data was gathered from January 1998 through December 2002 and was analyzed by subject classification rather than title by title. The discussion of their results focuses on overall holdings, average transactions per item, percentage of items circulated in a given subject collection, and ratio comparing ILL requests to holdings in a subject area. The findings were utilized by the library to inform remote storage and collection development decisions.

Kochan, C., & Duncan, J. (2016). Analysis of print purchase on demand titles ordered via interlibrary loan: A collection development perspective. *Collection Management*, *41*(2), 51-65. **Tags: POD/PDA, Collection Analysis, ILL Data Analysis**

Utah State University (USU) began a program in 2009 wherein they would immediately purchase particular titles that had just been requested via ILL if those titles also met certain prerequisite conditions relating to factors such as scholarship. They called this program POD-ILL, and the study of the program examined the value this services had to different groups of users and also looked at the various data produced by the service over years in an attempt to understand what materials patrons wished to access immediately so that gaps in the collection can be found. POD-ILL was first developed when the ILL staff noted that it was difficult to fill requests for newer materials, and also that fast turnaround and long check-outs were also a challenge. They developed their purchasing criteria for the program and their process of how ILL would work with Technical Services. From the inception of the program, staff kept certain statistical data: they tracked cost, who the heaviest users were and where they were located and what subjects were requested by what departments. These requests were also examined for interdisciplinarity, publishers, publisher type and date. The article ends by noting that this program mirrors similar programs at other institutions, but also states that one disappointment of the program is that remote users did not take advantage of the program more.

Lopez, A. & Mayr, P. (2013). EVA (ErwerbungsVorschlags-Assistant) assists in collection building! Using ILL data for patron-driven acquisition. *Interlending & Document Supply, 41*(4), 122-127. **Tags: POD/PDA, ILL Data Analysis, Departmental Collaboration**

ErwerbungsVorschlags-Assistant (EVA) is a tool for patron driven acquisitions through interlibrary loan requests. It has its own web interface for the acquisitions or subject librarian and a patron tracking interface. ILL requests are first checked for criteria such as availability, date of publication, etc. that can be defined by the institution. If it meets the purchase criteria it then goes to the librarian interface where it's decided whether or not it will be filled through ILL or a purchase will be made. If it does not meet the purchase criteria (out of publication, different language, etc.), the ILL request will automatically be filled. The EVA module also has an interface tied to the patron's ILL account letting them know the status of their request and if it will be filled through ILL or through a purchase. The overlying theme of this article is that acquisitions and interlibrary loan are not seen as competitors, but as two tools used towards the common goal of providing information to the patron.

Nabe, J., & Fowler, D.C. (2015). Leaving the "big deal"...five years later. *Serials Librarian, 69*(1), 20-28. **Tags: ILL Data Analysis, Collection Analysis, Serials**

Southern Illinois University, Carbondale (SIUC) ended agreements with 3 content providers. This article looks at ILL usage of the titles canceled to determine the wisdom of the decision. Looking at just one provider (Wiley) they discovered that there were over 11,000 downloads of the "lost titles" in the last year of the agreement. They determined that downloads did not accurately represent "use." In the years following canceling the subscriptions they discovered that only 25% of the lost titles were actually requested via ILL, indicating they made a worthwhile cost saving decision. The University of Oregon also followed a similar cuts and came to similar conclusions as SIUC.

Nixon, J.M., & Saunders, E.S. (2010). A study of circulation statistics of books on demand: A decade of patron-driven collection development, part 3. *Collection Management, 35*(3/4), 151-161. **Tags: POD/PDA, Monographs**

In January of 2000, Purdue University Libraries began a service they called "Books on Demand." Interlibrary loan requests for books meeting a set criteria were purchased for their collection rather than borrowed from another library. This article from 2010 is the third article to review the effectiveness of this program. The focus of this portion of the review is on circulation statistics. The review found that books purchased through this program had higher usage rates than materials purchased through traditional collection development methods. They also found that books selected by graduate and undergraduate students had higher usage rates than those selected by faculty through this program. Finally, the review found that usage rates varied depending on the department/discipline of the requestor.

Pedersen, W.A., Arcand, J., & Forbis, M. (2014). The big deal, interlibrary loan, and building the user-centered journal collection: A case study. *Serials Review, 40*(4), 242-250. doi:10.1080/00987913.2014.975650 **Tags: ILL Data Analysis, Serials**

This article discussed the impact of the breakup of Big Deals (such as Elsevier, Springer, and Wiley) on ILL requests. Broadly, breakup has not resulted in large increased ILL usage. The authors reviewed relevant literature and presented a case study (Iowa State U). The most salient points are the following: “The interaction between Big Deals and ILL/DD is starting to gain more attention and is perhaps moving more in a direction of ILL/DD exerting an influence on Big Deals rather than the opposite”; “Interlibrary loan cost data was therefore the primary criterion for decision making. However, it was supplemented with a second criterion that was entirely based upon usage. The subject librarians asked that any titles that averaged 100 uses per year over a 3-year period also be retained with active subscriptions”; and, “Breaking up Springer and Wiley did save some funds, but the real outcome was restoring the decision making about journal collections to the Iowa State University campus. Having individual subscriptions to Springer and Wiley titles will allow for a more systematic and regular evaluation of the ISU Library's journal collection.”

Pitcher, K., Bowersox, T., Oberlander, C., & Sullivan, M. (2010). Point-of-need collection development: The Getting It System Toolkit (GIST) and a new system for acquisitions and interlibrary loan integrated workflow and collection development. *Collection Management*, *35*(3/4), 222-236. **Tags: Collection Analysis, ILL Data Analysis, Departmental Collaboration**

In using interlibrary loan numbers to determine the best strategies for collection development, the goal of any library is to streamline the workflow, while including input from both the ILL and acquisitions departments. The State University of New York at Geneseo (SUNY-Geneseo) sought to meet this objective by developing and testing the GIST (Getting It System Toolkit) software platform in 2009. This platform works alongside ILLiad to direct ILL staff to freely-available electronic versions of articles, which eventually halved the turnaround time for filling requests. It also streamlines the acquisitions department’s work by checking to make sure it is not held locally and by providing purchase price. At the time of the article’s writing, SUNY-Geneseo planned to explore additional features that, budget permitting, it could add to GIST, to improve the workflow even more.

Ruppel, M. (2006). Tying collection development's loose ends with interlibrary loan. *Collection Building*, *25*(3), 72-77. **Tags: POD/PDA, Collection Analysis, ILL Data Analysis, Monographs, Departmental Collaboration**

This article analyzed a year’s worth of titles (specifically in the Education and Psychology disciplines) requested by patrons at Southern Illinois University Carbondale’s Morris Library during the 2004 calendar year. In addition to pointing to gaps in the library’s collection, interlibrary loan (ILL) data was used to support the author’s recommendation that the Morris Library implement a “books on demand” (BOD) program for requests that are of high quality based on book review analysis, inexpensive, new, easy to obtain with a comparable turnaround time to ILL, and appropriate for the library’s collection. A new procedure was enacted wherein the ILL staff refer book requests written in English and published within the last five years that fit their collection development policy to acquisitions to investigate its potential for quick purchase turnaround. Other reasons to support purchasing titles requested by patrons via ILL included meeting the research needs of a University community, building equity to the library’s collections, and adding titles that are likely to circulate again. One possible consequence, however, is that a BOD program may lead to a reduction in ILL requests, making necessary the reallocation of ILL funds to the materials budget.

Schmidt, L.M. (2012). When the pilot is over: Picking the program and making it stick, purchase on demand at the University of South Florida. *Journal of Interlibrary Loan, Document Delivery & Electronic Reserve* *22*(1), 59-66. **Tags: POD/PDA, Collection Analysis, ILL Data Analysis**

This article narrows in on when the Purchase on Demand pilot study is over and evaluates the results of the study at USF. The program was evaluated after three years by comparing it to other library programs and surveying library patrons. The author looks at three different models to categorize a purchase on demand program. The article demonstrates the necessary steps when implementing a purchase on demand program and discusses criteria that should be established, workflow, statistics analysis, and a patron survey.

Scott, M. (2016). Predicting use: COUNTER usage data found to be predictive of ILL use and ILL use to be predictive of COUNTER use. *Serials Librarian*, *71*(1), 20. doi:10.1080/0361526X.2016.1165783 **Tags: Serials, Collection Analysis, ILL Data Analysis**

With the high costs of bundled journal packages, or "Big Deals," and shrinking budgets, libraries are considering increased ILL use as an alternative. When breaking up a Big Deal, libraries should determine which titles received the most use, and then subscribe to those titles individually. One method of tracking continued use of these titles is the COUNTER (Continuing Online Use of Electronic Resources) system. To fill the gap, however, turning to ILL services is also necessary, despite the costs associated with using such services more. Ideally, costs aside, the number of ILL requests, compared with the number of article downloads for the cancelled journals, should be 1:1. In a University of Wisconsin - Milwaukee study, however, the ratio was closer to 1:17, which is closer to what many libraries face.

Tyler, D.C., Melvin, J.C., Epp, M., & Kreps, A.M. (2014). Don't fear the reader: Librarian versus interlibrary loan patron-driven acquisition of print books at an academic library by relative collecting level and by Library of Congress classes and subclasses. *College & Research Libraries*, *75*(5), 684-704. doi:10.5860/crl.75.5.684 http://digitalcommons.unl.edu/cgi/viewcontent.cgi?article=1241&context=libraryscience **Tags: POD/PDA, Collection Analysis, Monographs**

A five-year study was conducted at University of Nebraska-Lincoln (UNL) to determine if patron driven acquisitions (PDA) resulted in unbalanced library collections. When comparing purchases by patrons and librarians the results were not significantly out of line. The authors concluded that librarians need not fear a loss of control over the collection, or that PDA will replace traditional acquisitions. It was determined that with proper guidelines in place, patrons will select collection appropriate materials.

Tyler, D.C., Falci, C., Melvin, J.C., Epp, M., & Kreps, A.M. (2013). Patron-driven acquisition and circulation at an academic library: Interaction effects and circulation performance of print books acquired via librarians' orders, approval plans, and patrons' interlibrary loan requests. *Collection Management*, *38*(1), 3-32. http://digitalcommons.unl.edu/cgi/viewcontent.cgi?article=1306&context=libraryscience **Tags: POD/PDA, Monographs, Collection Analysis, ILL Data Analysis**

In this article, the authors review the professional library literature whose conclusions support the contention that patron-driven acquisition (PDA) leads to increased circulation transactions when compared to librarian selections and vendor approval plans. A large part of the literature suggests that PDA/POD programs have become a proven standard practice in many libraries. The authors review the correlates used to establish the relationship between book use and type of order and whether other variables might come into play when analyzing data (e.g. books' genre, price, age) and find that the vast amount of literature has failed to address the complexity of correlates as they pertain to circulation of materials. The authors also address the anxiety revealed in the library literature in regards to whether or not the popularity of PDA will mean the elimination of librarians involved in collection development. While librarians shouldn't be the only ones making decisions on selecting material for the collection, librarian expertise and familiarity with the communities they serve should ensure their ongoing relevance,

especially in regards to more expensive materials. Librarian selections also lead to greater circulation of material when compared to vendor approval plans.

Van Dyk, G. (2014). Demand-driven acquisitions for print books: How holds can help as much as interlibrary loan. *Journal of Access Services*, *11*(4), 298-308. http://scholarsarchive.byu.edu/cgi/viewcontent.cgi?article=2341&context=facpub **Tags: Monographs, Collection Analysis**

This article discusses how holds (the process by which a patron indicates that they would like to use an item as soon as it is available for checkout) and interlibrary loan requests can influence collection development. It explores the concept of using data about holds and interlibrary loan requests in tandem to determine if additional copies of a particular title need to be purchased. It also discusses high-demand items and suggests a process by which they can be tagged as unavailable for interlibrary loan in order to keep them available for local patrons.

Van Dyk, G. (2011). Interlibrary loan purchase-on-demand: A misleading literature. *Library Collections, Acquisitions and Technical Services, 35*(2), 83-89. https://scholarsarchive.byu.edu/cgi/viewcontent.cgi?referer=https://scholar.google.com/&httpsredir=1&article=1084&context=facpub **Tags: POD/PDA, ILL Data Analysis**

This article argues that interlibrary loan borrowing may actually be cheaper than POD if hidden overhead purchasing and cataloging costs are factored into cost-per-use analysis. It explores factors that should be considered when determining when an item might be cheaper to buy than to borrow. Although expensive items may require higher circulation to make their purchase cost effective, the author did not discuss purchases for reserves, which would presumably drive down the cost-per-use figure. The article also suggests that new studies are needed that reflect changes in the e-book and e-journal landscape.

Ward, S.M., Wray, T., & Debus-Lopez, K.E. (2003). Collection development based on patron requests: Collaboration between interlibrary loan and acquisitions. *Library Collections, Acquisitions and Technical Services, 27*(2), 203-213. **Tags: POD/PDA, Monographs, Collection Analysis, Departmental Collaboration**

This article looks at the on-demand collection development partnerships between ILL and acquisitions at the University of Wisconsin-Madison and Purdue University. It describes each program and what criteria they use to purchase a book, where books were purchased from, the workflow involved and some statistics on cost and circulation rates. The data for this article is taken from 2000–2002 when the programs were started. Both schools concluded that on-demand book acquisitions are a viable model to use.

Way, D. (2009). The assessment of patron-initiated collection development via interlibrary loan at a comprehensive university. *Journal of Interlibrary Loan, Document Delivery & Electronic Reserves, 19*(4), 299-308. http://scholarworks.gvsu.edu/cgi/viewcontent.cgi?article=1004&context=library_sp **Tags: POD/PDA, Monographs, Collection Analysis, ILL Data Analysis**

This article looks at patron-initiated collection development from the view of comprehensive universities, which tend to have numerous graduate programs, but focus on teaching over research and generally . Most previous studies have focused on public libraries, liberal arts colleges, and research universities. Comprehensive universities tend to have collections that emphasize breadth of coverage over depth. At Grand Valley State University, they noticed that over a five year span only 31% of the library's book

collection had circulated while realizing that ILL had seen a dramatic increase over that same time period. Seeing the increase of ILL as an indicator of unmet demand, they began putting together a patron-initiated collection development program. They used circulation analysis and peer comparisons as some of their criteria for evaluation of the program. They concluded that this program is an effective way to enhance the library's collection.

If you are interested in learning more about how Interlibrary Loan can inform a patron-driven acquisitions model, we recommend the following books:

Allison, D.A. (2013). *The Patron-driven library: A practical guide for managing collections and services in the digital age*. Oxford, UK: Chandos Publishing.

Bridges, K. (Ed.) (2014). *Customer-based collection development: An overview.* Chicago, IL: ALA Editions.

Carrico, S., Leonard, M., and Gallagher, E. (2016). *Implementing and assessing use-driven acquisitions: A practical guide for Librarians*. Lanham, MD: Rowman & Littlefield.

Nixon, J.M., Freeman, R.S., and Ward, S.M. (2011). *Patron-driven acquisitions: Current successes and future directions*. New York, NY: Routledge.

Swords, D.A. (Ed.) (2011). *Patron-driven acquisitions: History and best practices.* Berlin, GE: de Gruyter.

Ward, S.M. (2012). *Guide to implementing and managing patron-driven acquisitions*. Chicago, IL: American Library Association.

Appendix

Survey questions sent to members of the CARLI Resource Sharing Committee listserv on Friday, March 9, 2018.

In what library area/department do you primarily work? [select all that apply]
Access Services (Interlibrary Loan, Circulation, etc.)
Collection Development (Subject Liaison, Acquisitions, etc.)
Other (please specify)

Does your library use ILL data or statistics to influence collection development? [select one]
Frequently
Occasionally
Rarely
Not at all

If your library uses ILL data for a formal patron-driven acquisitions (PDA) model, please briefly describe how your library incorporates the ILL data into the PDA workflow.

Other than PDA, in which ways does your library use ILL data or statistics to influence collection development [select all that apply]:

At time of request, purchase material that is a good addition to your collection.
At time of request, purchase material that is more cost-effective to buy, rather than borrow.
At time of request, purchase material that may arrive more quickly than via ILL.

At time of request, purchase material that is unavailable through ILL.
Periodically review ILL statistics to look for potential gaps in collection.
Periodically review ILL statistics to purchase specific titles that were unavailable through ILL.
Periodically review ILL statistics to purchase previously requested material that is a good addition to your collection.
Consult ILL statistics before deselecting/weeding material.
Other (please specify)

Do you prioritize purchases from ILL based on requesting patron's status [faculty, graduate student, undergraduate student]?
Frequently
Occasionally
Rarely
Patron status is not a priority
Other (please specify)

What methods do you use to assess successful use of purchased ILL materials in collection development? [select all that apply]
Item is used by additional patrons after purchase
Item arrives in a timely manner
Survey of patron satisfaction
We do not have an assessment method
Other (please specify)

Would you be willing to discuss your library's workflows further with a member of the Resource Sharing Committee in a follow-up phone call?
Yes (if yes, please include name & phone number where we can reach you in comment box below)
No
Other (please specify)

Acknowledgment

The committee would like to thank Marcella Nowak for her contribution to this paper by providing details of the College of DuPage workflows.

2017–2018 CARLI SFX Systems Committee Annual Report

Membership
Steve Brantley, Eastern Illinois University
Karen Gallacci, Southern Illinois University Edwardsville
Andrea Imre, Southern Illinois University Carbondale
Max King, Illinois Institute of Technology
Geoff Pettys, Southern Illinois University School of Medicine
Laurie Sauer, Knox College
Peter Tubbs, Rush University (no attendance)
Erika Wade Smith, Illinois College
Lisa Wallis, Northeastern Illinois University
CARLI: Denise Green, Mary Burkee (partial year)

Meetings
We met for an in person meeting on October 20, 2017 at the SIU School of Medicine; Geoff Pettys hosting. Telephone conferences were held on the second Wednesday of the month, from 10am – 11:30am. The committee also assisted with SFX Interest Group Open Conference Calls.

- Thursday July 27, 2017 10:00 am – 11:30 am
  - Changes in direct linking were discussed
  - Discussed ideas for the annual project

- Wednesday August 16, 2017
  - Karen and Max will co-chair
  - Committee decided to work from a Google Doc created from the outstanding VuFind3 issues in GitHub. Members agreed to comment on issues already listed and other e-resource related issues.
  - Members will encourage student workers to test VuFind3

- Wednesday September 13, 2017
  - Discussed the document that we would turn in for the annual meeting, with a follow-up by email
  - Decided to test VuFind 3 in coordination with SFX. Committee members are especially interested in customizations available.
  - Elements of Citation Searcher were discussed

- Friday October 20, 2017 (in person with remote attenders)
  - Max talked about IIT's planned transition to VuFind3
  - Committee members listed positive aspects of VuFind3
  - A list was made of 12 items that were areas for improvement or points of concern about VuFind 3
  - A list of 11 action items was created consisting of question for Denise to ask the developer, a new google doc for likes and dislikes of SFX and VuFind 3, and a decision to continue to add to the action items list throughout the year

- Wednesday November 8, 2017
  - Denise asked for feedback on her Citation Linker/Fetch item web lesson
  - Progress report and additional discussion on the action items from the previous meeting

- Wednesday January 10, 2018
    - Discussed the usage report of the SFX tutorials on the CARLI website. Lisa volunteered to assist Denise with a new lesson about customizing CSS in SFX A-Z lists
    - Progress report and additional discussion on VuFind action items from the previous meeting
    - Steve reported on the CARLI annual meeting and agreed to send out documents from the meeting to the committee

- Wednesday February 14, 2018
    - Progress report and additional discussion on the action items from the previous meeting
    - Max reported on ITT's transition to VuFind 4

- Wednesday March 14, 2018
    - Denise asked for feedback on her new tutorial about switching to the simplified template
    - Max reported on ITT's lingering issues with VuFind 4
    - 5 of the committee's action items have been completed
    - Discussion on remaining action items

- Wednesday April 25, 2018
    - Committee's VuFind 4 suggestions that were implemented were well received by users: hide eresource; journal title search; SFX button
    - Andrea raised 2 additional VuFind 4 concerns:
        - Not easy to toggle back and forth between I-Share and local catalog
        - Facet display does not always show local library, ranking needs changed

- SFX open conference call in September focused on Citation Linker
- SFX open conference call in October focused on the new A-Z list
- SFX open conference call in January focused on the new A-Z e-book list & Citation Linker/Fetch Item
- SFX open conference call in June focused on Improving the SFX interface quickly and efficiently

Deliverable
The SFX 2018 annual project tested and recommended SFX features and displays in the new VuFind 4 Online Public Access Catalog (OPAC).

The SFX Systems Committee worked with CARLI staff to test SFX linking, UI display, and other features in the VuFind 4 OPAC. We used Google Docs, CARLI's GitHub, and lists of action items to track features ready for testing or further comment. Feedback was also given on searching for e-resources and journals in VuFind 4 since that is closely related to SFX usage in an OPAC. Finally, the committee recommended several display changes to declutter screens and improve serial holding displays.

We also worked with Illinois Institute of Technology to further explore SFX features during their early adoption of VuFind 4.

2017–2018 CARLI SFX Systems Committee Annual Project:
SFX and the New VuFind Public Catalog

The SFX 2018 annual project tested and recommended SFX features and displays in the new VuFind 4 Online Public Access Catalog (OPAC).

The SFX Systems Committee worked with CARLI staff to test SFX linking, UI display, and other features in the VuFind 4 OPAC. We used Google Docs, CARLI's GitHub, and lists of action items to track features ready for testing or further comment. Feedback was also given on searching for e-resources and journals in VuFind 4 since that is closely related to SFX usage in an OPAC. Finally, the committee recommended several display changes to declutter screens and improve serial holding displays.

We also worked with Illinois Institute of Technology to further explore SFX features during their early adoption of VuFind 4.

- Summary of User Interface (UI) and User Experience (UX) features investigated:
    - Implementing customized SFX buttons for each library
    - Remove "Search alternatives" option
    - Remove "Suggested topics" option
    - Add a journal title search option
    - Add "Hide e-resources I don't have access to" options in all I-Share OPAC
    - Add Feature used by University of Chicago's VuFind whereby SFX links/menu displays on the full bib record
    - Requested that a list of compatible authentication systems be added to the FAQ (e.g. CAS, Shibboleth)
    - Tested VuFind 4 keyword relevancy searching especially for periodicals
    - Commented on Date, location and other facets display
    - Observed that institution facet in I-Share is not necessary

- Actions taken as a result of investigation:
    - Developer implemented customized SFX buttons for each library
    - The "Search Alternatives" option was removed
    - Libraries now have the ability to hide "Suggested topics" from the top of the facets section
    - A journal title search option was added
    - Users can hide e-resources to which they don't have access
    - When making I-Share requests the default now correctly indicates that location is not set, prompting the user to select a library branch
    - CARLI re-indexed data and and altered configuration file to improve keyword relevancy

- Items still pending with developer:
    - Authentication linking is still evolving and committee will continue to give input
    - Committee has requested that facets be compressed rather than open by default

- Email alerts for items requested through I-Share are not working

- Continuing work:
    - Committee will test VuFind 4 keyword relevancy after Denise and colleagues work to improve it. Committee will continue to seek a solution to the 856 subfield z to ensure they are helpful for patrons
    - Committee will continue to look at new VuFind and report any features they are interested in implementing

2017–2018 CARLI Technical Services Committee:
Annual Report of Activities

Members:
Jessica Grzegorski (2016-2019) Newberry Library
Mary Konkel (2014-2018) College of DuPage
Joelen Pastva (2015-2018) Northwestern University
Gayle Porter (2017-2020) Chicago State University
Adrienne Radzvickas (2017-2020) Lincoln College
Nicole Ream-Sotomayor (2016-2019) University of Illinois at Urbana-Champaign
Sandy Roe (2015-2018) Illinois State University
Cynthia Romanowski (2016-2019) Governors State University, Chair
Chris Schmit (2017-2018) (resigned due to employment change to a non-CARLI institution.)
Staff liaisons:
Jen Masciadrelli
Nicole Swanson

2017-2018 Accomplishments:

- Annual project: Developing recommendations for indexing and display fields in New VuFind based on current "issues" from CARLI's GitHub https://github.com/CARLI/vufind/issues, as well as team member observations. Ultimately it is our hope that these recommendations can help the CARLI developers with their rapid development of New VuFind.
    - As a side note: Our original annual project was to be a series of webinars pertaining to, but not limited to, VuFind 3. These webinars would have demonstrated the differences between VuFind 0.6 and 3.0 in order to highlight key new features so that libraries could feel comfortable upgrading to the latest version. With the release of New VuFind it became clear that the committee's expertise could be better applied to the development of that interface.
- Maintained the Calendar of Upcoming RDA Trainings: https://www.carli.illinois.edu/products-services/i-share/cat/rda-resources-upcoming-training
- Mary and Joelen presented our Annual Project at CARLI Annual Meeting November 17, 2017.

Future Plans:

- Feature database maintenance projects: utilize findings from New VuFind recommendations to help identify clean-up projects that will best enhance the new features
- Provide more training videos for technical services staff, public services staff –and/or– assist CARLI staff in developing webinars highlighting New VuFind features.
- Create webinars utilizing original annual project topics including: VuFind version comparisons, optimizing data, LC Genre/Form Terms, searching/discovering non-print and non-traditional resources in VuFind.

Submitted by Cynthia Romanowski, 5/31/2018

2017–2018 CARLI Technical Services Committee Annual Project: Recommendations for the New VuFind Online Catalog

The Technical Services Committee has built a list of recommendations to assist CARLI developers in their continued efforts to improve the New VuFind online catalog. These recommendations reflect Committee members' investigations of New VuFind's indexing and display. The Committee has ranked these recommendations according to their level of importance, determined through the Committee's internal review and voting process which is reflected in the list of recommendations below. The Committee acknowledges that not only can these recommendations benefit CARLI developers, but they also can benefit all CARLI members and Illinois patrons utilizing the New VuFind I-Share catalog and/or local I-Share catalogs.

The recommendations chart below is broken down into the following headings:

1. Recommendation Number
2. Category
3. Recommendation
4. Details
5. GitHub Issue #
6. Rank

2017-2018 Technical Services Committee

Jessica Grzegorski (2016-2019) Newberry Library
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Cynthia Romanowski (2016-2019) Governors State University, Chair
Chris Schmit (2017-2018) National-Louis University (resigned due to employment change to a non-CARLI institution.)

No.	Category	Recommendation	Details	GitHub issue #	Ranking
1	Index	Index relationship designators in the Bib tags 100e, 110e, 700e, and 710e	The ability to search and filter results by relationship designator would narrow down results to a specific role when the creator queried as multiple roles. For example, Benjamin Franklin is both an author and an artist, and the user would select the proper relationship designator to determine desired results.		1
2	Display	Display Bib tags 561, 562, 563, 585 and 590 in Description tab in local catalogs.	These fields display copy-specific information that is important to individual institutions and their users.	193	1
3	Display	Display other Bib 5XX fields (501, 502, 505, 511, 515, 525, 530, 533, 546, 550, and 586) in Description tab.	Since 5XX note fields are generally not required, catalogers use them to communicate important information about a resource to users. This information can significantly help users in evaluating and selecting resources. These MARC fields generally do not need labels to be understood.	193	1
4	Display	Display Bib tags 510, 524, 541 (first indicator "1" or blank), 544, and 545 in Description tab.	These fields, especially 545, are commonly used when cataloging archival and special collections. Appropriate labels would also be useful for display: 510 = References; 524 = Preferred citation of materials; 541 = Source of acquisition; 544 = Other archival materials; 545 = Biographical/historical note.	193	1
5	Index	Index the Bib 880 fields as fielded searches (e.g., title, author).	880 fields with non-Latin script are currently indexed in VuFind for keyword searching only, so users cannot perform fielded searches (title, author) in non-Latin script. If they do, the result is always 0 returns.		1

No.	Category	Recommendation	Details	GitHub issue #	Ranking
6	Display	Clean up ending punctuation for the browse function.	Currently multiple entries appear in the author browse depending on the use of punctuation in the access point. E.g., in the UIUC instance, an author browse for Rowling, J. K. shows 2 entries: Rowling, J. K., [assume these have a $e in the bib] and Rowling, J. K.		1
7	Index	Fully index MFHDs.	Fully index MFHDs, including the 541, 561, 562, 563, 583, and 852 fields. Allow for searching these fields through a "Holdings Record Search" option in the local catalog.		1
8	Display	Display MFHD tags 541, 561, 562, 563, and 583 as "notes" in the holdings display of the local catalog.	Libraries use these fields to add copy-specific notes that are beneficial to users. These notes should display alongside holdings information in local catalogs.		1
9	Index & Display	245 $n and $p in bib record should display in results list.	In New VuFind, $n and $p do not display in results list. Adding the display of this field will make it easier to choose the correct record the first time instead of having to click on each individual record, especially since there is no ability to click on "Next Record." The result list should display in $a, $b, $n and $p order regardless of how they are entered within the 245.	136	1
10	Relevance Ranking	Identify how relevance is determined.	Assist developers in determining relevance ranking, including performing test searches for a variety of titles/formats and identifying other use cases	57	1

No.	Category	Recommendation	Details	GitHub issue #	Ranking
11	Index, Display, Relevance Ranking	Title keyword search should be by order of the input words.	In New VuFind, the Title keyword search does not display results in the proper relevance order which causes the desired title to be buried amongst the retrieved results. In VuFind 0.6, the Title search maintains the order at which the words are input within the search box, resulting in fewer results. In New VuFind, the search terms can appear in any order so long as they are within the title, resulting in far more records, but burying the desired record.	57	1
12	Format	Combine the format icon display name when electronic is triggered with a second format.	Use conventional terminology (as in VuFind 0.6) rather than FORMAT + ELECTRONIC. (e.g. eBook, eJournal, eMap, eVideo, eAudiobook, etc.) See Appendix.		1
13	Display	MFHDs to properly display holdings for items with no actual barcode when viewing the Holdings within the record.	MFHDs that have item records with no barcode will display the phrase "The catalog cannot display location or copy information at this time. Please ask a library staff member for assistance." This poses a problem for any library that does not use barcodes for their materials. It prevents accurate holdings data from displaying in the catalog; therefore, renders New VuFind useless.	242	1
14	Display	Display all 5XX fields from authority records in Author Browse.	Authority record for Rowling, J. K. has three 5XX fields, but only the first, "Galbraith, Robert" displays in the Browse results as a "See also." The 663 note from her record does display, directing users to 3 pseudonyms. The entry for Galbraith shows no 5XX fields, and also doesn't display the 663 note to also search under Rowling, J. K.		2

No.	Category	Recommendation	Details	GitHub issue #	Ranking
15	Format	Use bib tag 006 for audio recording facet.	Audio recording facet is currently limited to only the 008 field. Adding the 006 as well would allow for accompanying material to be represented in a search result when limited to the audio recording facet.		2
16	Format	Add format for "data" or "dataset."	Listed in GitHub as INACTIVE. Last note says: NS has been in touch with them to try to get a specification for a data/dataset format, but one has not yet been established. This does have merit.	124	2
17	Display	Modify field label for bib tag 555 when first indicator is blank.	The current label "Finding Aid" is misleading for cumulative indexes. Use label "Indexes" or similar instead when first indicator is blank. Continue to use "Finding Aid" for first indicator "0."		3
18	Index & Display	Display bib 245 $a,$b,$n,$p in proper order in results list.	In New VuFind, the 245 $a, $b, $n, $p are not sorting in the correct order, which causes the results to be incorrectly sorted. The same title and year, but different editions, should appear next to each. Currently, if a title is cataloged with the exact same title, but differs in edition statement, it does not display below the other as it previously did in VuFind 0.6.		3
19	Index & Display	Display bib tags 385/386 in search results.	Fields for audience and creator/contributor characteristics, e.g. Boolean search for 385 HIV Long-Term Survivors AND Caregivers or 385 HIV-positive persons AND Caregivers to find "Health care and HIV"	145	3

No.	Category	Recommendation	Details	GitHub issue #	Ranking
20	Record Navigation	Add a Next Record/Previous Record navigation option.	There is no current option to move forward or backwards in your search results once you click into a bib record. One must click on the Search to get back to the results list. However, if you happened to have chosen a title that has many results, it can be confusing as to where you left off in your record search. The search results currently do not display $n or $p nor does it properly rank the titles.	Similar to 217	3
21	Index	Search via 852 $k with Call Number search selected in local New VuFind catalog	Currently, you can search via subfield k entries by selecting the All Fields, but we recommend it be part of the Call Number Search.		3
22	Limits	Ability to limit via Location on initial Advanced Search in local New VuFind catalog	Currently, there is no way to limit to a specific location on the initial Advanced Search		3

Appendix

NEW VUFIND: FORMAT LABEL RECOMMENDATIONS	
Current New VuFind Format Label	**Recommended Conventional Terminology Change**
2D Art	no change
2D Art + Electronic	2D eArt
3D Object	no change
3D Object + Electronic	3D eArt
Archival Collection	no change
Archival Collection + Electronic	eArchival Collection
Archive	no change
Archive + Electronic	eArchive
Audio CD	no change
Audiocassette	no change
Blu-ray	no change
Book	no change
Book + Electronic	eBook
Braille	no change
CD-ROM	no change
***add new format	Dataset
DVD	no change
Journal/Magazine	no change
Journal/Magazine + Electronic	eJournal
Kit	no change
Large Print	no change
Manuscript	no change
Manuscript + Electronic	eManuscript
Map	no change
Map + Electronic	eMap
Microform	no change
Mixed Material	no change
Movie	Video
Movie + Electronic	eVideo
Music Manuscript	no change
Music Manuscript + Electronic	Music eManuscript
Music Recording	no change
Music Recording + Electronic	eMusic
Music Score	no change
Music Score + Electronic	eScore
Reel-to-Reel	no change

NEW VUFIND: FORMAT LABEL RECOMMENDATIONS	
Current New VuFind Format Label	**Recommended Conventional Terminology Change**
Slide	no change
Software/Computer File	no change
Spoken Word Recording	no change
Spoken Word Recording + Electronic	eAudio
Textual Material	no change
Textual Material + Electronic	eText
VHS	no change
Vinyl LP	no change