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Health Sciences Collection Development: An Overview of Fundamental Knowledge and Practices (2nd Edition)

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MEDICAL LIBRARY ASSOCIATION COLLECTION DEVELOPMENT CAUCUS

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Contents

Forward

This work was created by members of the Medical Library Association's Collection Development Caucus to provide librarians with key concepts about health sciences collection development. The chapters provide an overview of the knowledge, responsibilities, and tasks involved in the development and management of health sciences collections; it is recommended that readers refer to the references and further reading sections in each chapter for a more detailed look at each topic.

The first edition was published in 2019 and was updated with a second edition in 2023. This updated edition has a new section on unique collection genres; addresses Diversity, Equity, Inclusion and Accessibility in collections; incorporates significant updates to and expansion of previous content; and includes a glossary. New additions to each chapter, as applicable, include key communities and online courses for professional development.

We hope that this work gives our readers an accessible entry point into the foundations of health sciences collection development.

Core Collection Development Books

These four texts are core resources for any health sciences collection development librarian. Specific chapters are referenced throughout this work but we recommend that any interested librarian read them in full.

Chilton, G. (Ed.). (2022). *Managing licensed e-resources: Techniques, tips, and practical advice.* Pacific University Press. https://doi.org/10.7710/pup.945398.2022-001

"For those new to managing e-resources or as a quick reference, 11 past and present e-resource managers share practical tips and techniques for working with licensed online collections; this is the book the authors wish they had when they first found themselves with the profound responsibility of managing their institutions' e-resources."

Kendall, S. K. (Ed.). (2018). *Health sciences collection management for the twenty-first century*. Rowman & Littlefield.

This text offers a comprehensive overview of collection development in the health sciences. It covers general knowledge and best practices, highlighting their application in case studies written by practicing librarians.

Johnson, P. (2018). *Fundamentals of collection development and management*. American Library Association.

This general text is an excellent place to start if you are new to collection development.

Rose, M. & Inman, M. (Eds.). (2023). *Building health sciences library collections: A handbook*. Rowman & Littlefield.

A helpful starting point for newer collections librarians, especially those looking for lists of core books in medicine, nursing, and allied health.

Contributors

The following caucus members were primary contributors to the second edition:

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A final draft of this work was submitted to the caucus for review prior to publication.

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Cover design by Julia Martinez (Virginia Commonwealth University) and licensed under a Creative Commons Attribution-NonCommercial 4.0 International License.

The project team thanks the following primary contributors to the first edition, who built the foundation for this work:

- Ramune Kubilius
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- Ariel Pomputius

The following people reviewed the first edition:

- Brook Billman
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- Elizabeth Lorbeer
- Shirley Ryan
- Lori Snyder
- Erin Wentz

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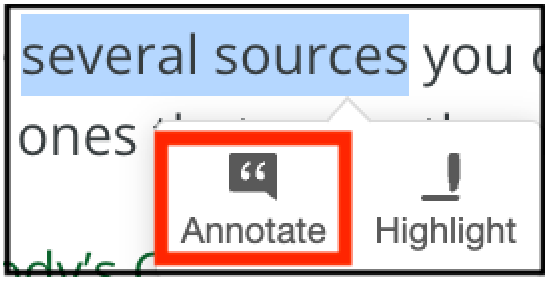

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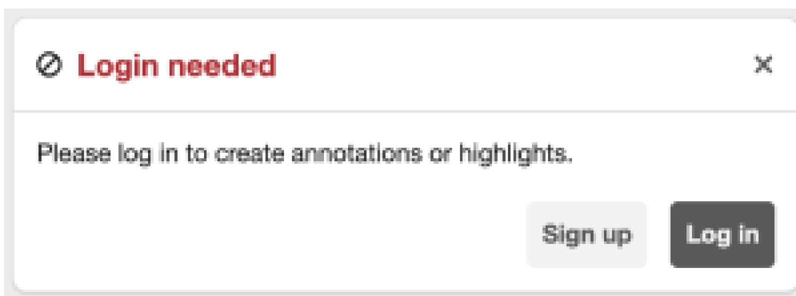

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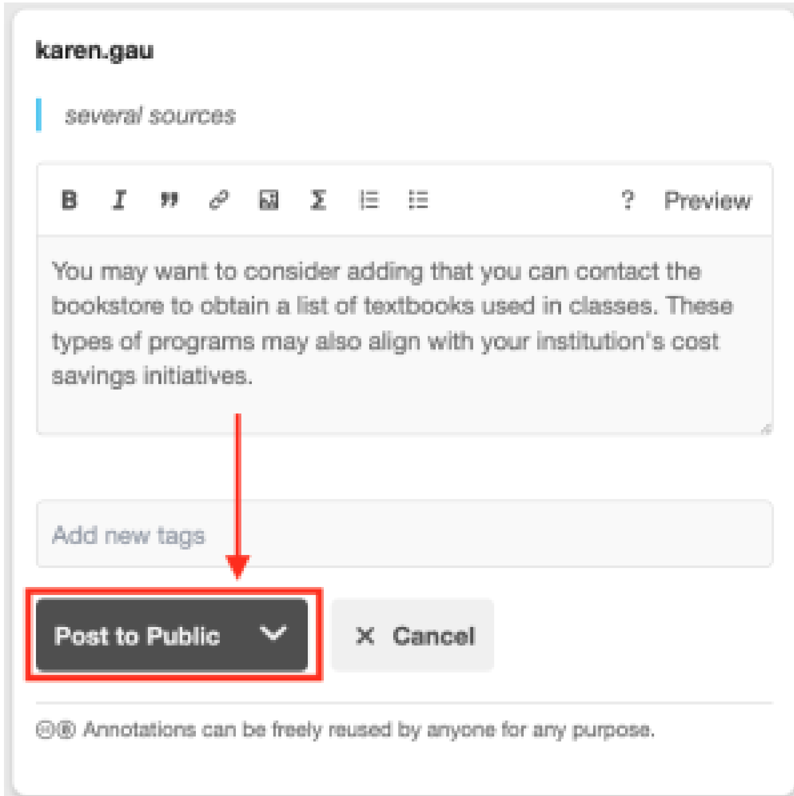

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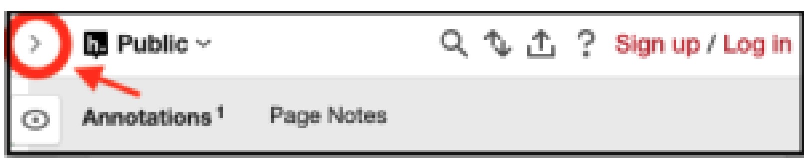

The editors meet every few months to update the work and will review feedback then. If you have any questions or would like a response sooner, you are welcome to contact them directly at gaukh@vcu.edu and iriskg@msu.edu.

Getting Started

Getting Started

Before you dive into creating or updating a collection development policy or purchasing any resources, you need to get the lay of the land. You should understand the ecosystem of your library, know your patron base, and identify institutional needs and priorities. All of these factors will influence your collection policies and decision-making.

Language To Know

Throughout your work and this ebook there are foundational collections terminology. Core terms include:

- **Approval Plans**
- **Standing Orders** (can be also be called a blanket order)
- **Slips**
- **Acquisition Platforms**

Library Ecosystem

Budget and Approvals Structure

Familiarize yourself with your…

- Budget
    - How is your library's collection budget structured and how does that fit within the overall budget for your library?
        - Your overall library budget is commonly divided into operations, salaries, equipment, and collections. See the Budget and Planning chapter [link] for more information.
    - What is your budget for…
        - Purchases
            - **Approval plan**
            - **Firm orders/one time purchases**
            - **Standing orders**
        - Subscriptions
            - Content types in subscriptions can include: journals, ebooks, streaming media, and databases.
            - Subscriptions can be to individual items or in "packages" which include multiple resources.
- Authorization structure

    - Who approves expenditures for orders?
        - There may be different people or departments who can authorize different types and sizes of budgetary expenditures.
            - For example, some libraries will allow individual selectors to submit orders up to a certain dollar amount with no additional approvals.
    - Who is authorized to sign licenses for subscription products?
    - What documentation is needed to place orders?
        - What order forms exist? Do they differ depending on the type or format of the resource?
        - To complete order documentation do you need to know specific fund code, location code, or action codes for adding editions/formats, specifying a print book location, placing a rush order, adding a duplicate copy, etc.?
- Recommendation Policies and Procedures
    - What are the library's expectations for whether and/or how you should communicate with patrons placing purchase requests, in addition to other library departments (e.g., acquisitions department, liaison department)?
    - How do interdisciplinary requests get triaged?
    - You may also have a patron-driven acquisition (PDA) or Evidence-Based Acquisitions (EBA) plan that can help you determine which ebooks your patrons are interested in reading.
- Timelines
    - What is your fiscal year?
    - What are your monthly and annual timelines for ordering?
    - Are there expectations for spending your entire allocated budget by a specific time, or are there milestones you need to meet?
    - When do other people need to be looped in?
        - Do other people need to place orders in acquisitions systems for specialty formats like streaming media?
        - Who signs your licenses?
        - Who negotiates pricing?
        - Who sets up e-resource authentication?

Library Systems

How you purchase materials will impact every aspect of your job as a collection management librarian. The systems and vendors that your library uses to purchase, subscribe, and collect information on your **holdings** all impact what you can buy. You should become knowledgeable about:

- The **Integrated Library System** used at your institution and its functionality, such as:
    - The ability to load records manually from small publishers.
    - The electronic resource management software used by the ILS.
        - Including which health sciences publishers are included in it
- The limitations of your institution's **acquisitions platform** such as which health sciences publishers are represented on the platform.
- Which formats your library prefers and can catalog/put on the shelf (e.g., electronic, print, spiral bound, pocket).
- What workflows and documentation your library vendors use for ordering materials. For example, do you purchase **firm orders**...

- on an acquisitions platform (e.g., GOBI, Matthews Book Company, or R2)?
- through spreadsheets and separate invoices (e.g., OVID)?
- through an annual **frontlist** (e.g., American Academy of Pediatrics)?

Vendors

Working with vendors is a core responsibility of a collections librarian. It is important to cultivate a productive and professional working relationship. Ideally, you will work as a team to get the materials your patrons want at a price your library can afford. The chapter on managing relationships with vendors goes into more detail about these relationships.

Understand Your Audience and Institutional/Organizational Needs

Before you can begin selecting resources, it is important to understand your audience. Below are some factors you may want to consider as you learn about how to support your institution/organization.

Who is part of your local community?

- Have you looked at your region's local health statistics?
  - What are the top diseases in your state?
- What consumer health needs do your patrons have?
  - Is consumer-level health information requested often?
  - What languages are predominantly spoken in your area?
  - What formats are needed to make health information accessible to your local community (e.g., large font books, talking books, braille)?

What research is happening at your institution/organization?

- What does your institution/organization's website say about its current research focus?
  - Tip: Join your organization's email lists for news alerts to stay up to date on the latest research.
  - Tip: Bookmark relevant websites and check them on a regular schedule.
- What research centers or institutes are on your campus?
- Which research projects at your organization receive grant funding?
  - Tip: Search NIH RePORTER by organization.

What areas need to be supported at your hospital?

- What clinical services/procedures/specialties does your hospital/system offer?

- Do you need to support residencies?
  - If yes, in what fields? For example – medicine, surgery, pharmacy, nursing, chaplaincy, etc.
    - Tip: Residency support may require specific clinical/practice resources, but also teaching resources, such as medical or nursing education journals and texts.
- For nursing, do you need to support Magnet or the Pathway to Excellence Program (PTEP)?
  - Tip: Nursing excellence programs like Magnet and PTEP may require collecting resources in evidence-based practice, nursing research, nursing leadership and administration, and nursing theory.
- What are your hospital administration and/or business office's needs?
  - Tip: Titles on business and innovation in healthcare are key to supporting the mission of healthcare organizations.
    - Administrators may rely on titles such as Harvard Business Review.
    - The acceleration in healthcare innovation has also given rise to new published by major health sciences publishers, but not indexed in PubMed, such as NEJM Catalyst or NEJM AI. To stay current, subscribe to publisher alerts. publications by subscribing to publisher alerts

What academic programs should be supported at your institution?

- What schools and departments are part of your institution?
  - What are the initiatives or priorities of the academic programs? Is there a focus on interprofessional education?
- Does your library have value, priorities, or considerations to consider for collection development (e.g., open and enduring access to information; diversity, equity, and inclusion; economic sustainability)?
- What courses are offered that the library can support?
  - Tip: Are you able to attend Curriculum Council meetings or can you view course syllabi?

What Should You Buy?

Hopefully you have a collection development policy that lays out the foundations of what your library collects. Knowing the call number ranges, topics, and programs/patrons served by your existing collection is essential for understanding the collection so you can grow or evolve it appropriately. It is also important to know what formats your library prefers (e.g., print, electronic, streaming media) to help you keep within existing structures for cataloging and acquisitions.

Even with a collection development policy, it is important to maintain flexibility. Situations may arise where you are asked to subscribe to something outside your policy's parameters. Exploring the request may be helpful if it might benefit the library from an organizational perspective. You need to understand your library's position in your organization and internal and external stakeholder politics, which could add new context to your decision-making. Remember that you are not required to honor all resource recommendations, but you should be mindful of the impact of saying "no." In some cases, perhaps you can offer alternatives.

For additional discussion of collection management strategies, see the chapter Evaluating Resources: Deciding What to Buy, Keep, Weed, or Cancel.

Diversity, Equity, Inclusion, and Accessibility (DEIA) in Your Collection

When purchasing or subscribing to content for your library's collection, it is important to keep DEIA in mind. Your collection development policy may provide guidelines on how to select DEIA-related materials. You may want to set aside time to consider how you can ensure that you are selecting content that will support historically underserved groups. Review the Medical Library Association Collection Development Caucus's list of collections-related DEIA-related projects and resources to get started.

Below are questions to consider for your material selection process when looking for new resources.

- Which DEIA-related subject areas are of interest to your community?
  - Create a well-defined list of topics to collect (that can evolve as needed) for consistency.
  - What books and journals are being requested through ILL? This can illuminate a gap in the collection or niche materials not covered by your book **approval plan**.
- How can you formally integrate DEIA considerations into your resource selection process?
  - For example, if you have an **approval plan** or if you receive alerts for new w/books, is it possible to adjust your criteria to ensure you are including DEIA-related titles?
- Does it make sense to explore different types of content (e.g., memoirs, graphic medicine), different platforms (e.g., Overdrive), or content from smaller or non-traditional publishers or university presses to bring a broader perspective to your collection?
- If applicable, have you or your library's liaison librarians reached out to the diversity officers or committees at your organization to see if they have suggestions for books, journals, or other resources that support their school's/ organization's DEIA mission, values, and objectives?

Keeping Up With New Resources

Keeping up with new resources is challenging, especially if you are new to collections. There are many vendors and platforms to know about, and potential purchases and subscriptions to consider. Knowing everything that might be relevant to your institution and patrons is a lot of work and develops over time. However, there are strategies to manage the information overload and efficiently stay aware of new resources.

Tracking

Regardless of how you find new resources, tracking them is essential.

This can look like:

- Adding a star to bookmark important emails, although be wary of accumulating too many.
- Keeping a spreadsheet of current and potential purchases and subscriptions.
- Creating a folder on book **acquisition platforms** (e.g., GOBI) for items under consideration.

However you do it, it is essential to keep note of who (if anyone) recommended it, its price, format, specific contract terms such as multi-year agreements and renewal increases, and where it is available.

General Strategies

There are some overarching strategies you can use to keep up with new resources:

- Cultivate relationships with disciplinary faculty so they contact you when they see a new resource in their subject area.
- Have a purchase request form available on your library's website.
- Proactively work with your vendor to get updates on new and in-development products.
- Sign up for vendor email lists. This is often the most efficient way to learn about new resources, but it may mean sorting through a lot of emails weekly.

Vendor communications can quickly become overwhelming. You can manage the deluge by:

- Working with your individual representative to manage how often they send emails to you, and asking them to limit their emails to certain products and resource types.
- Requesting that vendors send information updates or new product information via email and focus meetings on discussing renewals of existing products in your collection or timely needs.
- Setting up email inbox rules to funnel emails into folders for later review.
- Opting out of generic communication newsletters.

Books: Acquisition Platform Lists and Review Sites

Most **acquisition platforms** allow you to create a profile and set up notifications for new book titles. This may be through an **approval plan** or looking at topic lists.

Below are examples of acquisition platforms or subscription resources that provide new title lists. Many of these can be viewed for free and without an account, except where noted below with [$].

- Matthews' New Receipts page: https://www.matthewsbooks.com/newreceipts.aspx
  - The Matthews Book Company webpage can be slow to load.
- Rittenhouse's book catalog, which can be filtered to show newly released resources first for some categories: https://www.rittenhouse.com/rbd/Products/BrowseCategories.aspx
  - In Summer 2024 Rittenhouse ceased print acquisitions. They will maintain their R2 ebook platform. Their book catalog is reflective of new acquisitions.
- GOBI lists and **slips/approval plans** [$]
- Doody's reviews [$]: https://www.doody.com/dej/
- You do not need a Doody's subscription to access some of their lists, such as Doody's Core Titles and Special Topics Lists. This information is available through book purchase platforms like GOBI and R2 Digital Library, if you subscribe to those resources.
  - Doody's Special Topic Lists are useful for finding DEIA-focused health sciences books because the topics are often about underrepresented populations.

Not every new book will appear in the above resources — especially those from smaller and less-traditional publishers — and not all ebooks are available for libraries to purchase or subscribe to. For the latter, these are commonly due to publisher decisions such as:

- The ebooks are not available for individual purchase and are only available as part of a subscription package.
- The distribution model for an ebook is targeted at the individual consumer market and is not available for libraries to purchase on any platform.
- The ebook distribution model for institutions involves a lot of mediation and complex billing/access modalities (e.g., tokens) that make it untenable for your library to provide access.

Depending on your patron's needs and your collection development policy, you may need to seek out print book catalogs or specific publishers to fill in the gaps for non-English language titles, titles published by small or boutique publishers, and self-published works. These additional resources may also be helpful for finding DEIA-related titles.

Journals

Keeping up with new journal publications can be more challenging. In addition to the general strategies listed above, it is helpful to look at interlibrary loan statistics annually to see which journals are being requested that you do not have access to.

Please note that some journals may not be available individually via a subscription, but may only be available as part of package deals. There are also cases where the price break for getting a package may benefit your budget. In these situations, you will need to weigh the cost of subscribing to a larger package with unneeded journals versus getting only the title(s) needed.

Databases, Streaming Media, and Other Electronic Resources

Keeping up with new databases, streaming media collections, and other electronic resources like point-of-care tools can be difficult. Start by using the subject areas defined in your collection development policy to guide which resources to explore.

Strategies to find new electronic resources, not including books and journals, include:

- Signing up for a review newsletter like The Charleston Advisor [$], Doody's Review Service [$], or looking at reviews in the Journal of the Medical Libraries Association.
- Attending conferences and viewing vendor showcase presentations or participating in lunch-and-learns. These presentations often highlight new and upcoming resources.

Conferences

Conferences are a great way to learn about new products and meet with your current sales representatives. To maximize the benefits of a conference try to:

- Choose collections conferences like the Charleston Conference, or focus on collections-based sessions at the Medical Libraries Association (MLA) or Electronic Resources and Libraries (ER&L). See additional conferences in our professional development chapter.
- Attend vendor product showcase discussions or "Lunch and Learns."
- Collect flyers on new resources and/or get your badge scanned by the booth representatives to be added to their

email lists.

- Look at the conference program and see if there are networking opportunities to meet colleagues (e.g., Charleston Health Sciences Lively Lunch, MLA caucus luncheon).

Professional Webinars and Networking Opportunities

You can learn a lot of good information by attending webinars and networking opportunities focused on specific collection topics. At these events, attendees often recommend titles in niche areas that would be difficult to find through more traditional means. Join email lists such as the Medical Libraries Association Collection Development Caucus to build your professional network and find a community to discuss collections topics, trends, and issues.

Collection Development Policies

Why Have a Collection Development Policy?

A collection development policy, also referred to as a collection development guideline, provides guidance for library personnel with selection responsibilities. It also demonstrates that decisions are made thoughtfully and it specifies the rationale used to decide how collection dollars are spent. Collection development policies should:

- State the priorities and goals for the collection
- Explain the criteria used in making collection decisions
- Articulate the programs, clinics, patrons, etc., that are served by the collection
- Make clear why collection development is important
- Use plain language whenever possible so that your community can understand your library's policy

A collection development policy should be flexible to accommodate changes in formats, publication models, publisher pricing, etc. It should also be reviewed on a regular basis and the process for making changes to the policy should be outlined.

What Should a Collection Development Policy Include?

Elements of a collection development policy can vary based on a library's needs. There is no perfect formula for creating one, but the following items should be part of any policy being developed:

- An overview or detailed list of programs and patrons supported by the library
- Any advisory groups that are involved in collection decisions
- Selection criteria
    - Formats collected (e.g., print, electronic, audiovisual/media, software)
    - Subjects collected
        - General overview of core and supplemental subjects
    - Depth and scope of the collection
        - Are materials collected to support research, teaching/curriculum, and/or clinical needs? Consider how these match your patron needs and program requirements.
        - At what level does your collection support students throughout their academic career? Are you collecting for undergraduates, graduate students, residents, etc.? This will inform the format and reading level of materials you purchase (i.e., undergraduate to professional levels).
- Other selection criteria that describe factors to consider before **acquisition**. For example, scope, publication date, cost, authority of author/publisher, language, geography of the subject, reviews, etc.
- Diversity, Equity, Inclusion, and Accessibility (DEIA) considerations should be integrated throughout your policy to make clear your library's collection development values, goals, and efforts. A standalone statement can also be considered since it can strengthen communication and the reasons why it's important to diversify your collections. Please read the section below on DEIA in collection development policies for more guidance.

- **De-selection (weeding)** guidelines:
    - Criteria for the general de-selection of outdated and damaged materials.
    - Frequency of de-selection.
- Special considerations for patron requests to remove materials deemed inappropriate or controversial. See Simmons' College's policy guide on materials challenges in the academic library, as well as MLA's Censorship and Library Practices Toolkit. The following are also examples of general challenged materials policies:
    - Challenged Materials Policy from Clemson University Libraries
    - Challenged Materials Policy from Northwestern Libraries
    - Withdrawal Request Policy from George A. Smathers Libraries at the University of Florida
    - Digital Content Takedown Request Procedure for University of Illinois Library
- Identification of materials which are stored in perpetuity
- How often is the collection development policy reviewed and what is the process for making changes to the policy? Who has the authority to change and/or approve the policy?

You may also want to consider including the items below, although some of these may be covered by broader institutional library policies if the health sciences library is part of larger system:

- Compliance with accessibility standards
- Course reserves
- Donation/gift procedure(s) and/or policy(s)
- **Endowment funds** and materials specified to be bought by that fund
- Licensing considerations
    - Non-disclosure clauses for state-funded institutions
    - Governing law
    - Non-negotiable terms, as defined by institution
    - Definition of authorized users should cover the patron population needed
- Policies related to special collections and archival materials
- Protection of patron data
- Research Libraries Group (RLG) Conspectus collection intensity levels for each subject area (see https://www.loc.gov/acq/devpol/cpc.html)
- Resource sharing rights and restrictions; **Controlled Digital Lending (CDL)**, **InterLibrary Loan (ILL)**, **document delivery**.
- Technical requirements for all electronic resources. (See the Assessment section.)
- Technical support
- Usability and patron experience

The length of your policy will vary. Some institutions may prefer to separate policies or combine them all in one document. For instance, you may want to have a separate special collections policy. This will probably depend on the size of your special collections and if there are different library personnel in charge of special collections.

Sample Collection Development Policies

Academic University Libraries

- Michigan State University Libraries

- University of Colorado – Strauss Health Sciences Library
- University of North Carolina – Health Sciences Library
- University of San Francisco – Gleeson Library

Community College Libraries

- Wayne Community College
- Massasoit Community College: Nursing and Allied Health

Hospital Libraries

- Children's Mercy Kansas City
- Gerald Tucker Memorial Medical Library (National Jewish Health)

Special Libraries

- University of Pennsylvania – Veterinary Library
- University of Pennsylvania – Levy Dental Medicine Library

Diversity, Equity, Inclusion, and Accessibility (DEIA) Considerations in Collection Development Policies

DEIA considerations should be integrated throughout your collection development policy. Selection criteria may be used to improve DEIA such as intentionally including works from and about diverse voices and perspectives, materials about historically underrepresented and/or marginalized populations, texts about inclusive medical practices, collecting in a various languages, or choosing a variety of formats for accessibility such as print, online/electronic, and audio books (for low literacy or dyslexia). Some collection development policies will have explicit statements about how DEIA is woven into their development strategies. For others, it may be more implicit – they may collect in a variety of languages because it meets the needs of their patron population but this may be identified simply as collecting in non-english languages.

Sample DEI Collection Policies

- Sample DEI language used in collection development policies from the Consortium of Academic and Research Libraries in Illinois

Collection Development Manuals

Some libraries have a collection development manual to supplement their collection development policy. In addition to staffing considerations, licensing and other issues mentioned elsewhere, a manual describes:

- Collection development responsibilities
- Standards for technical requirements for new resources, such as resource interoperability, post-cancellation rights to content, availability of technical support, etc.

Sample Collection Development Manual

- University of New Mexico's [Collection Development Manual]

Collections Philosophy

Some libraries also have a separate Collections Philosophy, which serves as a guiding ethos for their acquisition and collection maintenance practices.

Sample Collection Philosophy

- Galter Health Sciences Library & Learning Center, Northwestern University Feinberg School of Medicine's Collection Philosophy

References and Further Reading

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Association of College and Research Libraries. (2019). ACRL statement on equity, diversity, inclusion, and the print collecting imperative. www.ala.org/acrl/sites/ala.org.acrl/files/content/acrlissues/ACRL_Print_Collecting_Statement.pdf.

Gregory, V. (2019). *Collection development and management for 21st century library collections: An introduction*. American Library Association.

Chapter 3 is on collection development policies.

Johnson, P. (2018). *Fundamentals of collection development and management*. American Library Association.

Chapter 3 covers writing policy statements.

Kubilius, R.. & Lawrence, J.C. (2022, April 15). Staying ahead of the future: Developing your library's collection philosophy and policy [Handout]. https://doi.org/10.18131/g3-f1xx-2d08

Handout that summarizes relevant resources and participant takeaways from an on-site Medical Library Association session held May 5, 2022 in New Orleans, LA.

Rodriguez, J., Kanungo, C., & Macias, A. (2020). Appraising the community of practice at a hospital library system using a critical librarianship lens. *Medical reference services quarterly*, 39(3), 269-279.

Sender, J. S., & Schroeder, H. M. (2018). Usability and accessibility for health sciences collections. *Health sciences collection management for the twenty-first century (pp.* 197-211*).* Rowman & Littlefield.

Swogger S. (2018). Managing a health sciences collection. In S.K. Kendall (Ed.), *Health sciences collection management for the twenty-first century* (pp. 33–78). Rowman & Littlefield.

Health sciences collection development policies are covered from pages 38-43.

Evaluating Resources: Deciding What to Buy, Keep, Weed, or Cancel

Evaluating individual resources is an important process when considering potential acquisitions or cancellations, and for comparing similar resources.

In addition to assessing individual resources, there are many reasons to assess, evaluate, and audit collections as a whole. The types of data collected, methods employed, and frequency of review are informed by the purpose of the assessment project. Examples of reasons to conduct an assessment include determining how effectively the collection meets the needs of its patrons, identifying duplicate or rare resources, creating benchmarks, establishing peer institutions, identifying and addressing content gaps, and weeding.

For the purposes of this section, the terms “assessment,” “evaluation,” “audit,” and “review” will be used interchangeably.

Library Mission and Purpose of Assessment

A library’s collection should directly support the library’s mission, just as the library directly supports its institution’s mission. Ultimately, the majority of resource and collection assessment activities will be conducted to evaluate how well the resource and/or collection is meeting patrons’ needs and aligning with the missions of its library and institution.

Resource Assessment

This section will cover how to evaluate specific types of resources. To evaluate the collection as a whole or a subsection of a collection, see the Collection Assessment section of this chapter.

Books and Ebooks (Monographs)

Assessing monographs requires decisions about which ones best meet your library’s needs. Considerations might include print versus electronic versions, staying up-to-date with the most recent edition, institutional authorship/editorship, local considerations such as curricular use or purchase requests, core publications in every specialty covered by your hospital, or if the perspective/content reflects the diverse perspective of your user communities.

When considering whether to invest in a new monograph or update an old edition, selectors may want to consider the publishing history – primarily the number of previous editions – and how often new editions are released. If a text has multiple previous editions, this may indicate that the audience has found the content valuable enough to encourage publishers to update and release new editions. Newer texts without a history of past editions may require closer scrutiny. You may also want to evaluate getting both a print and electronic version of the same text. Common reasons for this are to accommodate accessibilities/disabilities. Additionally, if your library is a Network of the National Library of Medicine (NNLM) resource library for your state, maintaining a print volume of record may be important.

Below are several sources you can use to assess monographs before purchase. Select the ones that make the most sense for your needs.

- Doody's Core Titles – A subscription-based collection development tool produced annually that highlights and reviews health sciences book titles recommended by content experts and librarians. Doody's Core Titles was founded in 2004, following the discontinuation of the Brandon/Hill lists.
    - Doody's Special Topics Lists are title lists on specific topic subjects (e.g., health equity, rural health, health insurance and the cost of health care) compiled by librarian and disciplinary experts. This is complementary to the existing Doody's Review Service and Doody's Core Titles lists that occur annually. The full title lists are available via a subscription to Doody's, and can also be accessed through other acquisition platforms (e.g., GOBI, R2, EBSCO Ebooks).
    - On the Doody's website you may see a BH symbol in a book's record or read references to the Brandon/Hill Lists. These were lists of core titles in medicine, nursing, and allied health that formed the basis of clinical libraries. The lists were discontinued in 2004 but their legacy continues as the foundation of Doody's Core Titles.
- Recommended bibliographies from professional organizations, such as:
    - Dentistry
        - MLA's Dental Caucus publishes recommended resources for clinical dentistry (2022) and dental hygiene (2022).
    - Pharmacy
        - The American Association of Colleges of Pharmacy publishes a list of basic resources for pharmacy education (2023).
- Search WorldCat for peer or local institutions' holdings, or consider a tool like OCLC's WorldShare Collection Evaluation
    - Note that WorldCat holdings may not always be up-to-date.
- COUNTER's standardized usage reports for ebooks, which can provide information on the usage of past editions, as well as turnaway data for past and current editions. COUNTER tutorials are available through their website.
    - These are usually provided by the vendor through their administrative portal.
    - Note that even though COUNTER reports are standardized, data field definitions can still vary across different vendor platforms.
- Circulation reports, pulled from the library's Integrated Library System (ILS), for previous editions in print
- Interlibrary loan (ILL) statistics
- Accreditation guidelines
- Faculty recommendations
- External LibGuide book lists
- Look at the lists of contributing authors through publisher websites or websites like Amazon

Some ebook titles may also be available through multiple vendors and platforms. In these situations, it may be helpful to conduct platform assessments in addition to evaluating the title's contents when making your purchasing decision.

Some **Patron-Driven Acquisition (PDA)** programs allow librarians to decide whether an ebook that has been accessed a certain number of times should be purchased. See the User-Driven Acquisitions (UDA) section for more information about PDA programs.

Journals

Evaluating journal subscriptions can be done on a title-by-title basis or for an entire bundle or package of journals (i.e., "Big Deals"). For many subscription packages, journals may be bundled together, and removing select titles may not be possible. Ideally, journals and journal bundles should be assessed regularly, prior to renewal, to ensure that the subscription is still valuable to library patrons.

Below are resources you can use to assess journal subscriptions. Select the ones that make the most sense for your needs.

- COUNTER's standardized usage reports for electronic journals. COUNTER tutorials are available through their website.
  - These are usually provided by the vendor through their administrative portal or the data may be available through **SUSHI**.
  - Note that even though COUNTER reports are standardized, data field definitions can still vary across different vendor platforms.
- Non-COUNTER-compliant usage reports for electronic journals
  - A vendor may provide you with their own usage reports that are not COUNTER-compliant. If this is the case, you will need to review their data field definitions closely since they may differ significantly from COUNTER definitions.
  - Circulation reports, pulled from the library's ILS, for circulating print journal volumes
- ILL statistics
  - Weigh the cost of ILL, document delivery, and/or pay-per-view against subscription costs.
- **Cost per use (CPU)** for electronic journals
  - To calculate CPU, utilize:
    - COUNTER reports to determine frequency of use
    - Invoices for past subscription prices
  - Note that low CPU tends to favor cheaper journals, since it doesn't take as much use to get a low CPU when a journal is low cost.
  - Expensive titles tend to have higher usage (although this isn't always the case) because they are usually the "premium" or "gold standard" titles. It may be worth separately considering the CPU threshold you are willing to accept for pricier titles.
  - Even if a title's CPU is a bit high, it might be worth keeping if its usage is extremely strong.
- **Bibliometrics**, such as:
  - H-factor, Eigenfactor, Impact Factor, or similar metrics
  - Institutional publication rates (such as authorship and citation rates)
- Institutional representation on the editorial board(s)
- Recommendation lists from professional organizations, such as the ones below. Some of the resources listed below are dated, but may still be helpful.
  - Dentistry
    - The Dental Caucus publishes recommended resources for clinical dentistry (2022) and dental hygiene (2022).
  - Health Administration
    - The Public Health/Health Administration Caucus publishes a journal list for health services administration (2012).

    - Nursing
        - The Nursing and Allied Health Resources and Services Caucus has a selected list of nursing journals (2016).
        - "Mapping the literature of pediatric nursing" by Watwood (2016). PMCID: PMC5079488
    - Occupational Therapy
        - "Mapping the literature of occupational therapy: An update" by Potter (2010). PMCID: PMC2901014
    - Pharmacy
        - The American Association of Colleges of Pharmacy publishes a core pharmacy journals title list (2022).
    - Physical Therapy
        - "Mapping the core journals of the physical therapy literature" by Wells et al. (2011). PMCID: PMC3133899
    - Public Health
        - The Public Health/Health Administration Caucus publishes journal lists for biostatistics (2011), epidemiology (2011), health behavior and education (2011), public health journals (date unknown, file was uploaded in 2015).
    - Vision Science
        - The Association of Vision Science Librarians' website includes a vetted list of vision science journals.
- Search library websites to see if your peers subscribe to specific journal titles. You may also consider looking on their LibGuides, reaching out to them directly to see if they subscribe to certain packages, or consider using a tool like OCLC's WorldShare Collection Evaluation. You can also ask your vendor directly.
- Tools like CelusOne and Unsub can aid in visualizing and aggregating journal usage over time.
    - Unsub is typically used to analyze Big Deals with certain vendors and evaluate cancellation options. See the Big Deals section for more information.
- Feedback from your user group
    - Feedback from your user group can provide useful context on how resources are or will be used, which can be difficult to determine from quantitative usage statistics or turnaway data. It is especially important to consider obtaining feedback when conducting a journal cancellation project.

Below are other factors to consider when assessing journal titles.

- Do you have **perpetual access** to a journal's content and/or its backfiles?
- Is the title essential to a small department? Smaller departments may generate comparatively lower usage, but some of the titles in their subject areas may be worth keeping if they are critical for their work.
- Does the title support a need and/or gap in your institution's research as it relates to Diversity, Equity, Inclusion, and Accessibility (DEIA)?
- How are the needs at your institution changing? Which titles would support burgeoning areas of research at your institution?
- Does the journal participate in **CLOCKSS**?
- Does your library participate in **LOCKSS**?

Databases

Electronic databases come in all shapes and sizes – from subject-based, full-text offerings to streaming media collections. How you evaluate a database greatly depends on its contents. Like journals, access to databases tend to be subscription-based and should be regularly assessed to make sure that the content is still being utilized. Database content can also be added and removed regularly by the publisher/vendor, so it is important to review content changes when they are released to determine if the changes significantly affect the usefulness of the database for library patrons.

Content (including streaming media)

Below are some items to consider when reviewing the contents of a database:

- Is this resource appropriate for the library's audiences?
- Is the content unique? Does the resource fill a gap in the collection? Does it provide a missing perspective or voice?
- What is the blend of must-have content versus content that is less useful (or doesn't meet your collection guidelines)?
- How do you access the databases (e.g., IP authentication, single sign on [SSO], username/password)?
    - For an overview of common authentication and authorization mechanisms used in academic libraries, see Carter and Hanson's white paper and webinar recording (2022).
    - Is the content available through ILL?
    - Determine frequency of use and CPU over time to help with renewal decisions.

Platform

See the Assessing Platforms section in this chapter for additional items to consider beyond the content itself. When assessing a database you will always review the content and the platform together. For example, you could have excellent content but the platform features and functionality make it not user-friendly.

Sources of Database Reviews

There are several key resources that publish database reviews:

- Doody's Review Service
- Charleston Advisor
- Journal of the Medical Libraries Association
- Medical Reference Services Quarterly

You can also try emailing Medical Libraries Association caucus lists to get feedback on a potential database acquisition from peer librarians.

Other Resources

You may need to assess other types of resources as well, such as **citation management tools**, **systematic review production tools**, etc. During your evaluation process, you should consider the following:

- Who is the audience for this resource? Is there currently a demand for this type of resource within that community?
- Is this resource accessible to a wide variety of audiences (i.e., Web Content Accessibility Guidelines or WCAG-compliant)?
- Does this resource fill a gap at your institution? Does it fill a Diversity, Equity, Inclusion, and Accessibility (DEIA)-related need?
- Is it appropriate for the library to pay for this resource as opposed to another unit at your institution?
- How much administrative upkeep does it require from year-to-year?

See the Assessing Platforms section in this chapter for additional items to consider.

Collection Assessment

Beyond assessing individual resources, librarians also need to assess subsections of the collection or the collection as a whole in order to identify trends and patterns. These holistic evaluations can provide a big picture view of the direction your collection has been taking and insights into opportunities for large-scale change or improvement.

Sources for Assessing Collections Content

The assessment method(s) employed for a collection assessment will depend upon the purpose of the project. Examples of common types of assessments and the data typically collected to conduct those assessments include:

- Subject coverage
  - Inventory list(s) pulled from the ILS (**Integrated Library System**)
  - **Interlibrary Loan (ILL)** statistics
  - For books: authoritative subject guides from professional organizations, accreditation guidelines, examination study guides, course syllabi, Doody's Core Titles, or similar
  - For journals: Journal Citation Reports (JCR), Dimensions, Scopus, or a similar cross-disciplinary database that specializes in citation data
- Peer benchmarking/comparisons with other libraries
  - Inventory list(s) pulled from peer library catalog(s), OCLC tools such as Worldshare Collection Evaluation or similar. These bring together several types of collections data in one spreadsheet (e.g., ILS-based data, call number, local holdings, holdings at peer libraries/nationally, check out data)
- Needs assessment/Meeting patrons' needs and/or expectations:
  - Patron feedback through surveys, focus groups, curricula committee meetings, institutional reports, or similar
  - Recommendations from subject liaison librarians
  - ILL statistics
  - For books: authoritative subject guides from professional organizations, accreditation guidelines, examination study guides, course syllabi, Doody's Core Titles, or similar
  - For journals: JCR, Dimensions, Scopus, or a similar cross-disciplinary database that specializes in citation data
- Cancellation decisions for electronic resources
  - COUNTER reports

    - Invoices for past subscription prices and price quotes for anticipated price increases
    - Patron feedback through surveys, focus groups, curricula committee meetings, institutional reports, or similar
    - Bibliometrics, such as impact factors and the institution's publication rates (institutional authorship and citation rates)
- Core collection lists
    - Inventory list(s) pulled from the ILS
    - For books: authoritative subject guides from professional organizations (see book assessment sources), accreditation guidelines, examination study guides, course syllabi, ACRL's Resources for College Libraries, Doody's Core Titles, or similar
    - For journals: JCR, Dimensions, Scopus, or a similar cross-disciplinary database that specializes in citation data, and recommendation lists from professional organizations (see journal assessment sources)

Frequency of Assessment

How often a collection should be assessed depends on the needs of the library; the amount of time, energy, and staff available to devote to the project; and the intended scope. One of the factors related to assessment frequency is whether there have been changes at the institution that the library supports. Changes could include new patron groups (e.g., new academic programs or hospital specialties), modifications to curricula or accreditation guidelines, adjustment of library or institutional goals, and changes to collection budgets.

Diversity Audits

A diversity audit involves inventorying a library collection to understand its coverage of historically underrepresented populations, voices, and experiences. It is typically completed to identify and rectify a collection's gaps in order to make it more inclusive. Some common approaches include conducting a diversity audit on an entire library collection or a random sampling of it; checking a collection against award/recommendation lists (i.e., list checking); or conducting an audit on a well-defined section of the collection (Voels, 2022). Book order audits, in which a title is assessed during the ordering process, may also be used to supplement a diversity audit of the collection (Jensen, 2017).

Diversity audits are a more common practice in public and school libraries, although academic and health sciences libraries have completed versions of them to improve their collections as well. Below are some considerations for health sciences libraries to think about when considering a diversity audit.

- Which Diversity, Equity, Inclusivity, and Accessibility (DEIA) subjects will you assess?
    - Which stakeholders should be defining this criteria with you (e.g., liaison librarians, faculty, community members)?
    - Consider whether to include topics such as rural health, homelessness, incarceration, and other topics that may impact health.
- What will you use to determine whether a book matches your criteria (e.g., subject headings)?
- Does it make sense to spend time assessing older materials (which may contain outdated health information) or should your audit focus on evaluating newer content?
- Does it make sense to take into consideration an author's identity/lived experience for your audit? If so, how will you identify whether an author fits a particular category while also being respectful of their privacy?
- Which formats make the most sense to evaluate?
- How much time do you and your staff have to conduct an evaluation? Make sure to scope your project accordingly.

- When your evaluation is complete, how do your community's demographics compare to what's covered in your collection?
- Can you conduct a book order audit in tandem with a larger project, to make sure that your evaluation stays up to date?
- How will you address your audit's findings?
- How do you plan to ensure that your diversity audit is not a one-off project? How will the findings influence future collection development?

Doody's Special Topics Lists are title lists on specific topic subjects (e.g., health equity, rural health, health insurance and the cost of health care) compiled by librarian and disciplinary experts. This is complementary to the existing Doody's Review Service and Doody's Core Titles lists that occur annually. The full title lists are available via a subscription to Doody's, and can also be accessed through other acquisition platforms (e.g., GOBI, R2, EBSCO Ebooks).

OCLC has a short video about how to use GreenGlass as a tool for DEIA analysis.

The Medical Library Association's Collection Development Caucus also publishes a publicly available list of collections-related Diversity, Equity, Inclusion, and Accessibility (DEIA) projects and resources, available through their website. (Scroll down to the Public Resources section for a link to the Google Doc.) The list includes some diversity audit projects.

Assessing Platforms

All electronic resources are hosted on an interface or platform where the patron can view and interact with the resource. In addition to evaluating the content that is hosted on these platforms, assessing the platform itself is very important, especially when considering whether to acquire a new resource, when comparing similar resources, or after major platform upgrades have taken place.

Considerations for platform evaluation include:

- Access
  - Does the resource work with the library's existing modalities of access, such as its **proxy** server (e.g., EZProxy), SSO, or link resolver (e.g., SFX)?
  - Does the resource appear in the list of resources included in the **discovery layer** for the institution (e.g., Summon, Alma)?
  - Mobile app availability
- Accessibility
  - Are there any Americans with Disabilities Act (ADA) accessibility concerns? Will the company share up-to-date **Voluntary Product Accessibility Template (VPAT)** documents with you in advance and send you revised VPAT documents over time? What is their response to improving the platform to meet accessibility requirements?
  - The Big Ten Academic Alliance (BTAA) has a Library Accessibility toolkit that covers the latest guidance in assessing collection material accessibility and includes ideal license language. They have publicly published accessibility evaluations and vendor responses for many electronic resources in health sciences and other disciplines.
- Cost
  - Is there a discount for a multi-year contract?
  - If content is available on multiple platforms, which platform is most cost effective? Are there sacrifices in platform quality when paying a lower price?
  - Does the vendor offer a free trial that lasts long enough for all interested parties to evaluate the resource?
  - Is there another department at the institution that should manage the resource instead? For instance, if the

resource is predominantly or solely for the use of one particular group, perhaps that group should purchase or manage it directly.

- Setup and maintenance
  - What will the resource setup entail?
  - What metadata and/or **MARC records** are available from the vendor/publisher?
  - Mobile app requirements
- User experience
  - Is the design intuitive or frustrating?
  - Will the resource be easy to use or easy to teach?
  - Does it include functionality that your users might want, such as downloadable PDFs, saving searches and results, stable/durable URLs, and exporting images?

General Tips for New Resource Assessment

Have a process/procedure in place for evaluating new resources that makes clear:

- All tasks for evaluating the new resource.
- Who will carry out a given task (e.g., internal staff, external stakeholders)?
- Deadline(s) for evaluation and acquisition decision.
- Evaluation criteria that addresses your library's acquisition requirements and needs such as making sure the resource works well with your existing systems (e.g., EZproxy, discovery layer) and if the vendor provides reliable MARC records.
- Evaluation modality (e.g., email messages, online polls).
- Archiving of the written evaluations/poll results.

Weeding, Deaccessioning, and Canceling Resources

Weeding is also referred to as deaccessioning or deselection. Broadly speaking, the terms can be used interchangeably. Weeding and deselection tend to refer to the weeding process of physical materials. Deaccessioning often refers to the removal of electronic resources from a collection. Deaccessioning is also the term frequently used in integrated library systems (ILS) to refer to the process of removing records from the library catalog.

The Big Picture

Weeding a library collection is an enormous undertaking, often involving several staff members from several departments. A few libraries have weeding workflows that continually cull all or parts of their collection. Most libraries do not weed unless there is a specific need to do so. Budget cuts, space constraints such as downsizing, off-site storage plans, and changing collection goals can all play a part in a decision to develop a weeding plan.

After 20+ years of collecting electronic resources, libraries are now turning an eye to weeding their digital collections too. These suggested best practices will address separately the deselection of print and digital resources even though there is overlap between the two.

The Weeding Plan

Whatever scenario you find your library in, a weeding plan should begin with the library's mission statement, collection development goals, and collection development policies. All three will provide a framework for your weeding plan. See below for examples of how this might work in practice.

- **A hospital library's mission** is to provide the most current resources available to support clinical care. Its collection development policy is to keep only the most current edition plus one previous edition of English language core materials. High priority is given to Doody's Core titles.
- **An academic medical school library's mission** is to support academic and clinical research, and up-to-date clinical care, with an emphasis on digital resources over print. To support in-depth academic research, they keep all previous editions of materials relating to core research areas of the institution. No foreign language materials are actively collected.
- **A community college's mission** is to support the academic goals of their institution. The health sciences collection is one component of a central collection and high priority may be given to texts required by their health sciences programs. Maintaining a current collection of high-demand materials is a larger priority than retaining a retrospective or historical collection.

Weeding plans can vary in scope from your entire collection to a smaller subject area (e.g., nursing), and should be developed with staffing and time constraints in mind. Weeding criteria may vary for various subject areas and should be communicated clearly and consistently, especially when working as a team. Individual interpretations of ambiguous guidelines can lead to inconsistent results when several subject specialists are evaluating their areas.

Weeding Physical Items

Common withdrawal criteria for physical items include:

- Outdated titles, if having the most current content is essential
    - Consider whether a title might be one of very few to address a topic or is from an underrepresented voice in your collection (e.g., Diversity, Equity, Inclusion, and Accessibility), in which case you may want to keep it.
- Duplicate copies
    - Duplicate copies can be useful when a title is popular, but over time, they may no longer be needed.
    - For titles where the library owns both the print and electronic versions, consider whether the print is necessary.
- Print journal volumes/year ranges that overlap online holdings
    - If offsite storage is available, print journal runs are often sent there instead of being withdrawn from the collection.
- Out-of-scope titles according to your current collection policies and institutional needs
- Materials with low usage statistics.
    - Items that were non-circulating at some point (e.g., reference, course reserves) or were requested through ILL

    may not have usage data that accurately reflects past usage.
    - Low usage stats, especially for print materials, may obscure the benefits of retaining a resource by or about historically marginalized communities or authors since these authors do not reflect the majority voice or perspective.
- Copies available at other local, affiliated, or **consortia** libraries, or through **shared print repositories** and **retention programs**.
- Damaged, lost, or missing print items that you are not going to replace
- Obsolete or unsupported formats (e.g., Beta tapes, cassette tapes, etc.)
- Non-functioning or outdated teaching tools

Weeding Electronic Items: Deaccessioning and/or Canceling Resources

Weeding electronic resources can mean several things in practice. For items that are owned with perpetual access rights but are old, inaccurate, or have very low usage, **deaccessioning** the item record (sometimes called suppressing or deleting the item record) will remove the items from public view and/or your collection. For items or resources that require a subscription, cancellation of the resource will remove it from your collection.

The criteria used for weeding print materials also apply to electronic resources, but there are some additional considerations for electronic resources, as listed below.

- Usage reports for electronic resources (whether COUNTER-compliant or not) need to be obtained from your vendor's administrative portal or directly requested.
- If an electronic resource does not have post-cancellation rights, then all digital holdings for a journal/book will disappear. Keeping print holdings for this content may be a priority in this type of situation.
- Do your technical services staff have the time and resources to weed your digital collection?

Collection Analytics for Weeding Projects

The same resources you use to assess whether to purchase items can be used to determine if you should weed them. One common collections data analytics tool used for weeding large collections is OCLC's Greenglass, which focuses on print resources held by a library. To use this tool, the library must also have its holdings in OCLC. OCLC has a short video about how to use GreenGlass as a tool for DEIA analysis.

Disposal of Weeded Materials

There is no single solution on how to dispose of deaccessioned print materials. Institutional guidelines and policies should dictate what can be done with weeded print items. Some institutions have restrictions on the sale of property; others will let a library have a book sale or donate materials elsewhere. One question that can come up is whether institutions in other countries might be interested in weeded materials. The answer is usually "no" because the materials being removed are outdated or damaged in some way.

Communication and Outreach

Libraries should be mindful of patron responses to weeding and plan accordingly with their administration. This includes both electronic and print material cancellations and weeding. Decide early on how public the weeding process will be and what communications will occur. Gathering feedback from users regarding what materials to weed can be helpful and allow for a more collaborative approach to weeding the collection. Talking to other librarians who have engaged in similar weeding projects can help identify areas of concern and strategies for success.

If you are conducting a major electronic journal cancellation project, the University of California's "Communications planning and execution" section of their publisher negotiation toolkit offers helpful considerations for crafting an effective communication strategy.

Review the section on Communication and Outreach Considerations for Collection Development for additional communication considerations.

Online Courses for Professional Development

- American Library Association CORE: Fundamentals of Collection Assessment.

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Kelly, M. (2021). *The complete collection assessment manual*: *A holistic approach*. American Library Association.

Kendall, S. K. (Ed.). (2018). *Health sciences collection management for the twenty-first century*. Rowman & Littlefield.

This book covers user-oriented collection assessment (Chapter 4), resource usability and accessibility (Chapter 7), points to consider when collecting data (Chapter 8), and case studies on weeding (Chapter 2) and walking away from a resource (Chapter 4).

Kristick, L. (2020). Diversity literary awards: A tool for assessing an academic library's collection. *Collection Management*, 45(2), 151-161. https://doi.org/10.1080/01462679.2019.1675209

Library Accessibility – Introduction. (n.d.) Big Ten Academic Alliance. Retrieved July 29, 2022, from https://btaa.org/library/reports

Johnson, P. (2018). *Fundamentals of collection development and management*. American Library Association.

Chapter 8 is on "Collection analysis, accountability, and demonstrating value."

Voels, S. (2022). *Auditing diversity in library collections*. ABC-CLIO.

This book is geared towards auditing public and school library collections but may offer some helpful context for how diversity audits are typically conducted.

Acquisition Models

Libraries can acquire content in several different ways. Libraries can order titles one-by-one or as a collection. Collections may be organized by publication date, subject, vendor, or other structure. Some vendors let the library select a set number of titles to create their own collection.

Journals

Journals can be acquired by selecting and subscribing to individual titles or as part of a package. They can be subscribed to as an individual library, library system, or in consortia. Journal backfiles, permanent online archival access to past journal issues, are often purchased as a one-time expense.

Big Deals

A Big Deal is a large journal subscription package with all the included titles predetermined by the vendor. It is an alternative to purchasing journals on a title-by-title basis and can provide access to more content for less money than purchasing journals individually. Both individual libraries and library consortia enter into Big Deals. The individual cost-per-library is usually reduced when a group of libraries expresses interest. Whether Big Deals provide good value is a topic of debate and largely depends on the vendor's terms and the institution's values and needs. The value of Big Deal's has been reassessed in recent years and academic libraries have explored walking away completely or breaking up their Big Deals.

Unsub is a commonly used tool for assessing the value of a Big Deal. It is important to make sure you understand its underlying assumptions by scanning the literature and speaking with other librarians. Price et al. (2021) has helpful advice on important factors to consider when using this tool.

Ebooks and Print Books

For the purposes of this section, *books* refers to both print books and ebooks. Specific formats will be referenced as appropriate.

Approval Plans

An **approval plan** is a collection of books that meet pre-specified criteria. The library gives the vendor guidelines such as desired subjects, price limits, and reading levels (e.g., undergraduate, professional). The vendor could be a publisher or a bookseller. The vendor notifies the library as books meeting those criteria become available. The vendor may send a title list that meets the library's criteria or they may send the actual print book to the library. If a vendor automatically bills and sends print books this is referred to as a "Blanket Order."

Firm Orders

A **firm order** is when a library orders something as a one-time purchase. Usually this refers to purchasing individual books. The library and the vendor have not made any special arrangements about the order ahead of time. There are no obligations to reorder the content again in the future even when a new edition is published.

Standing Orders

Some titles release new editions, new volumes, or new books in a series, on a regular basis. A library may want to always purchase the newest edition or volume when it becomes available. Instead of placing a separate order each year the library can set up a standing order. A **standing order** is an agreement to preorder each new edition or volume automatically. The vendor will simply send the newest edition or part to the library and charge the appropriate fee. A standing order can also refer to a journal subscription.

User-Driven Acquisitions (UDA)

User-Driven Acquisition (UDA) is an umbrella term to describe acquisition models that incorporate library patrons. There are multiple UDA models, but they are all similar in that patrons participate in the decision on what titles will be added to the collection.

Patron-Driven Acquisition (PDA)/Demand Driven Acquisition (DDA)

PDA and DDA are two names for the same program. In a PDA or DDA model, the library selects a set of titles to make available. The library loads information about those titles into their library catalog, discovery layer, or other ebook search tool. Patrons then discover and access the titles in the same way as they discover and access anything the library owns. If a title gets used enough times, it may trigger a usage fee for the library or an email to the selector for further review. With this model, the library only pays (or considers paying) for content that its patrons actually use. Be sure to check your contract to ensure the PDA/DDA vendor will allow you to stop the program at any time with no penalties.

Setup: Short Term Loans and Purchases

Many libraries choose to rent a title first and then purchase it upon subsequent uses. These ebook rentals are often referred to as Short Term Loans (STLs). For example, you could set up your PDA/DDA plan to do two STLs and then purchase the title outright on the third use. Or you could set up your plan to do one STL and buy on the second use. The price for an STL is usually a percentage of the total cost of that title and can vary widely by vendor. The cost may also change over time. Some PDA/DDA vendors may allow even further customization where factors like the price of the loan and the full price of the title can be considered. If that is the case, you could opt to purchase a title outright on the first use if it is over or under a certain amount. The amount you spend on STLs does not apply to purchase of the title. You will spend more than the full price of the book if the book ends up getting purchased. On the other hand, you can potentially save money if you have a lot of books that are only used one or two times and never trigger a full purchase.

The PDA/DDA vendor you are working with should be able to give you a list of the rates for different publishers. You may want to exclude certain publishers based on their rates. Some PDA/DDA vendors will also allow you to set a limit for STLs that will be the highest dollar amount and/or the highest percentage you are willing to pay. Each library makes its own decisions about how many STLs to allow before purchasing the title.

Setup: Profile

The setup process involves creating a profile that will determine which titles are made available to your patrons. This process is similar to developing an approval plan, and includes choosing factors such as subject area, publisher, and price. Depending on the vendor you work with, you can choose Library of Congress or National Library of Medicine call number ranges you would like to include. The vendor should also be able to give you a list of the publishers that are included and you can also choose to exclude publishers. For example, if you have access to a publisher's content on another platform you will probably want to exclude them from the PDA/DDA plan so you don't purchase content you already have. The PDA/DDA vendor may allow you to submit a list of ISBNs of books you already have so they can deduplicate against your existing holdings.

Assessment and Monitoring

It's a good idea to monitor the plan, especially in the first several months. You will want to look at the titles in your profile to make sure they conform with the types of titles your library usually purchases. If you see a large number of titles that don't fit your collection, work with your PDA/DDA vendor to have them removed.

You will also want to look at your expenditures to determine if you are using the right number of loans as a trigger to purchase. For instance, if you are seeing a lot of titles being purchased that are never used again, you could increase the STL trigger amount. Or you may see that you are spending more money than you would like on loans and want to purchase earlier. You will be able to change any of your settings and it may make sense to start off with conservative criteria and then make adjustments.

Access to Own (ATO)

Access to Own is the same as PDA/DDA except that the loans count towards the purchase of the title. Once the loans add up to at least 100% of the list price, the library will own the title. ATO loans are usually more expensive than STLs.

Evidence-Based Acquisitions (EBA)

In an EBA plan, the library works with a single publisher to get access to all or part of their title list for a certain amount of time, usually for a year. The library agrees to pay a certain amount of money up front to have unlimited access to the set of titles. They can then load the titles into their **OPAC**, **discovery layer**, or search interface. At the end of the access period, they will be given usage reports to review. Titles can then be selected for outright purchase. The number of titles the library selects depends on the amount they paid up front and the cost of the desired titles. For example, if you pay

$10,000 for your EBA plan you will be able to choose $10,000 worth of books to own perpetually. If you want to purchase more than that amount, your library will need to pay the difference.

Traditional Acquisitions vs. Inclusive Access

Traditionally, physical items (i.e., print books, print journals, DVDs, BluRay) are purchased for library collections so that one patron can borrow an item for a predetermined time period. Other patrons must wait for the item to be returned before it can be checked out to a second individual. Digital items are also shared among patrons, although how many users can view the item at a time depends on their license. Licenses for 1, 3, 5, or unlimited **concurrent user access** are the most common options offered by vendors.

With inclusive access, the library or institution purchases an individual copy for each person who will be using the material. Each patron gets their own copy of the content. Examples of inclusive access purchasing models are: using tuition or mandatory fees to cover the costs of those materials or setting aside a pool of money from the library budget to be used on an as-needed basis.

Streaming Media

Purchasing streaming media can be complex and depends on which platforms you have access to as well as your library's ability to host content. It is common to see streaming media available to purchase as a **firm order** with 1-, 3-, or 5-year licenses. Although these acquisitions function as a one-time firm order, the access licenses must be re-purchased after the term expires in order to continue access to the title. Streaming videos may also be purchased with perpetual access licenses, although typically these are sold as files that will need to be downloaded and hosted at your institution. For downloaded files, you will want to ask for a file that includes captions as well.

It is common for streaming media to move between platforms or not be available for libraries to purchase. In particular, titles that are exclusive to streaming platforms such as Hulu, Netflix, and Amazon Prime will often have no option for educational streaming rights.

To show films at a public event, you will need to obtain a license for Public Performance Rights (PPR). This may or may not be part of your license agreement and may cost extra. PPR is typically available for one-time showings but some vendors also offer perpetual PPR.

Agents & Acquisition Platforms

Agents are the companies that support libraries in finding and purchasing materials. Often agents act as third parties for procurement and payments – you submit your orders, invoices, and financial details to them and they pay the resource provider. Commonly used agents include GOBI (EBSCO), Rittenhouse, and Harrassowtiz.

Some agents have developed their own acquisition platforms. Acquisition platforms help libraries discover print books and ebooks to acquire (including the provision of approval plans and blanket orders), compare pricing between sources, and place orders. The pricing options available through these vary depending on the aggregator or publisher. They often include titles in disciplines beyond the health sciences although some specialize in health sciences topics (e.g., Matthews

Book Company and Rittenhouse). In these tools, different permission levels can be set. For instance, some people may have permission to recommend titles but not place orders while others may be able to approve and submit orders.

In GOBI and OASIS, two well known acquisition platforms, libraries need to first set up or confirm licensing agreements with the publishers and vendors whose platforms they want to view. Both systems also have standard licensing agreements for many publishers and booksellers. Afterwards, specific titles can be searched through those tools to see which publishers and booksellers they're able to purchase it from.

Select Vendors

This section briefly introduces some of the vendors that you may encounter as well as some of the bigger names in health sciences publishing. Libraries can order titles on an aggregator platform or directly from a publisher. The list is not exhaustive and is not an endorsement of any aggregator platform, publisher, vendor, or bookseller.

Aggregators

A vendor can aggregate, sell, and host titles from multiple publishers. For this type of vendor, content is aggregated in one interface, usually based on the type of content, although sometimes it can include a mix. For instance, they may offer one platform for ebooks from various publishers, another for streaming media, or the platform may include both.

Ordering through an aggregator can make it easier for library patrons to find, navigate, and use content from multiple publishers in a single interface. They may, however, include digital rights management (DRM) that can limit the number of pages a user can download or the ability to print, as well as have usage limitations or higher costs.

Aggregators have many benefits for institutions with limited staff time. One downside to aggregated databases with ebooks or multimedia is that the vendor/aggregator may add or remove titles at any time and with limited notice. You may receive an email from the vendor when titles are added or removed, but there may be limited or no options available to regain access to those titles.

EBSCO

EBSCO has ebook-only subscription packages that incorporate a variety of health sciences subjects. You can purchase firm order ebooks through them as well. The EBSCO platform is also an interface for subject databases like Cumulative Index of Nursing and Allied Health Literature (CINAHL), Health and Psychosocial Instruments (HaPI), and AgeLine.

ProQuest

ProQuest is a library aggregator that owns several other companies, such as the streaming media publisher Alexander Street Press which offers many health sciences titles and collections. They offer ebook subscription packages (e.g., Academic Complete) and the option to purchase individual ebook titles through firm orders. Their ebook hosting platform is called Ebook Central. The ProQuest platform is also an interface for subject-specific databases such as Dissertations & Theses.

Rittenhouse

Rittenhouse is an aggregator that specializes in health sciences print books and ebooks. As of Spring 2022, Rittenhouse ebooks are only sold with 1-user licenses, although multiple 1-user licenses may be purchased.

TDS Health

TDS (Teton Data Systems) Health is an aggregator that specializes in health sciences resources. They offer ebooks, reference tools, study aids, and test preparation tools. They use a subscription model for their ebooks, which are all part of the STAT!Ref Library. Subscription ebooks are selected on a title-by-title basis. As new editions of subscribed ebooks become available on the platform, the library's access automatically updates.

Publishers

A publisher is the company or person that prepares and publishes journals, books (print and electronic), media, cases, question banks, and other original content. Each publisher will have its own platform for hosting their content. Ordering titles directly from the publisher usually gives libraries the best pricing with the fewest limitations. It may be useful to be aware that the clinical side of the company will often have different reps from the other divisions. For example, you will likely have a different representative for ClinicalKey than ScienceDirect, even though they are both part of Elsevier.

Listed below are some of the largest publishers of health sciences content. You should, however, also consider purchasing from smaller or independent publishers in order to broaden the diversity of your collections contents, and to help prevent the monopolization of resources. Matthews Book Company and R2 Digital Library both list health sciences publishers that they work with on their websites, which include smaller publishers in addition to larger ones. Neither list is comprehensive but they serve as a good starting point for familiarizing yourself with what's available.

It is worth noting that society publishers are increasingly having their back catalogs and frontlists bought and brokered through aggregators.

Elsevier

Elsevier publishes resources for the basic sciences and health professions. They have books, journals, multimedia, and procedure videos along with other educational resources. Other electronic resources that they sell include ClinicalKey, Embase, ScienceDirect, Scopus, and Mendeley.

McGraw-Hill

McGraw-Hill's flagship product is the Access-branded clinical specialty databases (e.g., AccessMedicine). The Access platforms include ebooks, study resources, multimedia, patient education handouts, and pharmacological information as well as other educational resources. They have an electronic library platform that offers a limited selection of individual firm order ebooks in the health disciplines. They also sell JAMAevidence, the First Aid series of ebooks, OMMBID, and USMLEasy.

Springer Nature

Springer Nature has DRM-free ebooks, journals, and databases. They sell frontlist ebook packages (i.e., ebooks for the upcoming year) and will also sell individual titles, as long as you meet a minimum purchase requirement. Their ebook library is called SpringerLink. Some of their other products include Springer Nature Experiments, SpringerMaterials, and SpringerProtocols.

Thieme (pronounced Tee-Mah)

Thieme publishes health sciences books, journals, cases, and interactive multimedia. They have a particularly strong emphasis on atlases. Their two main subscription products are the discipline-specific MedOne ebook and multimedia collections, and the Thieme Clinical Collection, which includes clinical titles for residents and practitioners.

Wiley

Wiley sells journals, books, and various databases. Their subscription ebook packages are available via the Wiley Online Library platform, and libraries can also purchase individual titles. Wiley's best known health sciences databases are The Cochrane Library and Essential Evidence Plus.

Wolters Kluwer (Ovid and Lippincott Williams & Wilkins)

Wolters Kluwer provides access to journals, books, multimedia, study resources, and other products. Wolters Kluwer is the parent company, Ovid is their online content provider/platform, and Lippincott Williams & Wilkins (LWW) is their publishing arm. They sell their own ebooks as well as ebooks by other publishers. They offer subscriptions to subject-specific Health Libraries as well as ebooks that can be purchased on a title-by-title basis. Other electronic resources that they sell include UpToDate, Lexicomp, FireCracker, and AudioDigest.

Online Courses for Professional Development

- Collection Development: Subscribing to and Renewing Electronic Resources from the Medical Library Association
- Fundamentals of Acquisitions from American Library Association

References and Further Reading

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Falloon, K. A., & M. O'Reilly, F. (2020). Prioritizing accessibility in the E-resources procurement lifecycle: VPATs as a practical tool for E-resource acquisitions and remediation workflows at academic libraries. *The Serials Librarian*, 78(1-4), 130-140. https://doi.org/10.1080/0361526X.2020.1722020

Gregory, V. (2019). *Collection development and management for 21st century library collections: An introduction*. American Library Association.

Chapter 5 covers acquisitions.

LaMagna, M., Swenson Danowitz, E., & Rodgers, A. (2020). "Competing ebook acquisition models: Which model best serves a community college library? *Collection and Curation*, 39(2), 33-40. https://doi.org/10.1108/CC-07-2019-0019

Price, J.S., Levine-Clark, M., & McDonald, J.D. (2021). Using the unbundling power of Unsub responsibly: Unveiling its assumptions and unpacking its defaults. In B. Bernhardt, L. Hinds, L. Meyer, & K. Strauch (Eds.), *Charleston Conference proceedings* 2020 (pp. 30-63). Against the Grain Media. https://doi.org/10.3998/mpub.12470905.

Vassar College Libraries. (2022, April 27). *Approval plans. Collection development and management.* https://library.vassar.edu/libraries-collections/collections-development-management/approval-plans

This webpage describes some of the strengths and weaknesses of approval plans.

Unique Collection Genres

Augmented Reality (AR), Virtual Reality (VR), and Visualization Tables

Augmented Reality (AR) and **Virtual Reality (VR)** have become a mainstay in academic libraries. These technologies can be used to explore 3D models or gross anatomy interactively, provide standard clinical training through simulations, teach students empathy by providing immersive experiences from the perspective of a patient, and more. Visualization tables that use 3D modeling and/or incorporate these technologies (e.g., Anatomage, Sentra) are also found in some health sciences libraries.

These technologies can require substantial financial and labor investments, including ongoing staff training, building space, software/hardware updates, and upkeep. Before purchasing AR or VR products, it is helpful (and essential in the case of visualization tables) to engage with faculty and students to understand how they could be integrated into curricula. Any acquisition in this area should also be made in consultation with your Information Technology (IT) department and other potential stakeholders. A plan that includes ongoing budgetary support should be developed to ensure continual updates, maintenance, and significant upgrades in technology.

Further Reading

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Lessick, S., & Kraft, M. (2017). Facing reality: The growth of virtual reality and health sciences libraries. *Journal of the Medical Library Association*: JMLA, 105(4), 407. https://doi.org/10.5195/jmla.2017.329

Consumer Health

Reviewed by Dana Ladd, PhD, Health and Wellness Librarian, Virginia Commonwealth University Libraries

Consumer health materials are written for the lay public and can include resources for specific populations like children, young and new adults, and seniors. They may include information in a variety of languages, focus on certain cultures, and be generally written at a lower literacy level. These materials may be in a variety of formats such as those for Deaf, hard of hearing, blind, or low vision patrons including print, audiovisual, and anatomical models. Materials typically include **monographs**, comics, graphic novels, or pamphlets. Topics include information about specific diseases(symptoms, diagnosis, treatment, living with), other medical information, drugs and supplements, cookbooks, wellness and prevention, caregiving, advice books, and memoirs.

The volume and depth of a library's consumer health collection will vary based on library type and need. Many academic libraries will have a small collection or not buy content from this genre at all. Hospital libraries often have a substantial consumer health collection aimed at their patient populations, with language and format determined by their patient demographics. Any decision to purchase in this genre should be detailed in your collection development policy, including any special considerations for your specific patron population. A weeding schedule for consumer health materials should be outlined in the library's collection development policy. In general, consumer health material should be weeded after five years (for health information that changes) and even sooner- every three years for treatment information and most cancer consumer health information.

Those selecting consumer health materials can find book reviews (such as in *Publisher's Weekly* and *Library Journal*) to be helpful resources for finding titles.

Communities

- Medical Library Association's (MLA) Consumer and Patient Health Information Services Caucus. You must be a member of MLA to join this caucus.
- Goodreads Consumer and Patient Health Information Group

Online Courses for Professional Development

- Network of the National Library of Medicine's Consumer Health Collection Management course.
- Medical Library Association's (MLA) Consumer Health Information Specialization. Additional fees may apply.

Further Reading

Ansell, M., & Pomputius, A. (2018). Reimagining print materials in a health science context: Creating and marketing a wellness collection. In B.R. Bernhardt, L. Hinds, & L. Meyer (Eds.), *Charleston Conference proceedings* 2017 (pp. 176). Against the Grain Media. http://dx.doi.org/10.5703/1288284316657

Joseph, C.B. (2018). *The Medical Library Association guide to developing consumer health collections*. Rowman & Littlefield.

Justice, A. V. (2021). Stages of a grief collection: Creating a focused section in a hospital library. *Journal of Hospital Librarianship*, 21(1), 93-96. https://doi.org/10.1080/15323269.2021.1860640

Data Sets

Reviewed by Nina Exner, PhD, MLS, Research Data Librarian, Virginia Commonwealth University Libraries

Collecting **data sets** is a complicated endeavor. Often they have very narrow use terms, are restricted to one research team, and cannot be shared broadly. It is important to read license terms carefully and pay attention to the use, access, sharing, and exporting allowances.

They can also be extremely expensive – upwards of tens of thousands of dollars for one data set. Additionally, dataset vendors may either provide data only through their own platform with a maintenance charge, or else provide the data as files only without hosting or search. Therefore, you need to consider who will store the data, and how it will be stored, discovered, and served out. File formats also matter. If it is not a spreadsheet/CSV file, is special software needed to read and analyze it, and does your institution have access to that? This is especially an issue with "big data" dataset licenses.

Your library may be asked to host data sets generated by institutional researchers. The NIH data sharing policy may also impact what is requested of libraries. Oftentimes, subject data repositories like Dryad or generalist ones like Open Science Framework are a more appropriate location but they may have fees for membership or deposition.

Further Reading

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Graphic Medicine

According to GraphicMedicine.org, graphic medicine is "the intersection between the medium of comics and the discourse of healthcare." Graphic medicine collections include comics, graphic novels, and zines that have a health care theme. They are often used to support medical humanities, health communication, and health care narratives. An annotated bibliography by Alice Jaggers and Matthew Noe lists core essential resources that can help a library get started with collecting in this area. Additionally, JAMA issues a "Best of Graphic Medicine" list annually.

Communities

Graphic medicine is one topic of interest among others for the following communities.

- American Library Association's (ALA) Graphic Novels and Comics Round Table. You must be a member of ALA to join this Round Table.
- Medical Library Association's (MLA) Health Humanities Caucus. You must be a member of MLA to join this caucus.

History Of Medicine

A history of medicine collection broadly encompasses written works, **ephemera**, audiovisual materials, photographs, and objects on the topic of medicine that also have historical value. Libraries will often have a separate collections policy for these materials – e.g., gift policies, access procedures, preservation, and **finding aids** – because of their unique needs. Often these collections are stewarded by archivists/curators or non-health sciences special collections librarians.

Sample collections include:

- Harvard's Center for the History of Medicine

- Michigan State University's veterinary medicine history collection
- Osler Library of the History of Medicine
- UCLA's History of Medicine and the Sciences

Communities

- Medical Library Association's (MLA) History of the Health Sciences Caucus. You must be a member of MLA to join this caucus.
- Rare Books and Manuscripts section of the Association of College and Research Libraries (ACRL). You must be a member of ACRL to join this section.
- Society of American Archivists (SAA). You must be an SAA member to network with their sections, which includes a Collection Management section.

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Greenberg, S.J. (2018). The hunt of the unicorn: Collection development for Special Collections in health sciences libraries. In S.K. Kendall (Ed.), *Health sciences collection management for the twenty-first century* (pp. 231-248). Rowman & Littlefield.

History of the Health Sciences Community of the Medical Library Association. (2019). *History of the health sciences web links*. https://hhsmla.blogspot.com

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McElfresh, K. R., & Gleasner, R. M. (2019). Evaluating a historical medical book collection. *Journal of the Medical Library Association*, 107(4), 560–565. https://doi.org/10.5195/jmla.2019.666

Normal, J.M. (Ed.). (1991). *Morton's medical bibliography: An annotated check-list of texts illustrating the history of medicine*. Garrison and Morton.

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Shisler C. M. (2007). Evaluating your nursing collection: A quick way to preserve nursing history in a working collection. *Journal of the Medical Library Association* : JMLA, 95(3), 278–283.

Shklar, G., & Chernin, D. A. (2002). A *sourcebook of dental medicine: Being a documentary history of dentistry and stomatology from the earliest times to the middle of the twentieth century* (Vol. 3). Maro Publications Limited.

Thompson, H. S., & Blanchard, D. L. (2001). One hundred important ophthalmology books of the 20th century. *Arch Ophthalmol*, 119, 761-763.

Leisure/Popular Browsing

Increasingly, health sciences libraries are providing popular materials that many consider the purview of public libraries such as fiction and biographies. This may be especially important if your community does not have a readily available public library or if you want a collection onsite for patients who cannot leave the hospital. When creating a leisure/popular browsing collection, you will want to consider the size of the collection, annual expenditure, room for growth, genres collected, and an area for display.

Further Reading

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Brookbank, E., Davis, A. M., & Harlan, L. (2018). Don't call it a comeback: Popular reading collections in academic libraries. *Reference and Patron Services Quarterly*, 58(1), 28.

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Grabeel, K. L., & Luhrs, J. (2020). Elevating literary wellness: A hospital library adds a leisure collection. *Journal of Hospital Librarianship*, 20(2), 101-110.

Olson, M. (2020). Patients want pages: Books to beds. *Journal of Hospital Librarianship*, 20(3), 263-265.

Makerspace Technology

Makerspaces in health sciences libraries can utilize either the collections budget or the operations budget. Oftentimes, they fall under the operations budget but collections budgets can be used for equipment and materials purchases. Some makerspace technologies include: 3D printers and scanners, laser and electronic cutting machines, sewing machines, soldering kits, and programming kits such as Raspberry Pis. Virtual Reality equipment and other digital tools may also be part of or adjacent to Makerspaces. Print magazines and trade publications on projects or topics related to makerspaces may be collected in addition to the tools themselves. Makerspaces associated with health sciences libraries or programs may also include scientific or medical equipment such as microscopes, stethoscopes, or neurological reflex hammers.

Further Reading

Burke, J. J. (2018). *Makerspaces: A practical guide for librarians*. Rowman & Littlefield.

Herron, J. (2019). *3D printing in medical libraries: A crash course in supporting innovation in health care*. Rowman & Littlefield.

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Patterson B., Casucci T., Hull B.E., Lombardo N.T. (2018) Library as the technology hub for the health sciences. *Med Ref Serv* Q. 37(4): 341-356. https://doi.org/10.1080/02763869.2018.1514899

Willingham, T. (2017). *Library makerspaces: The complete guide*. Rowman & Littlefield.

Non-Traditional Online Resources

Resources beyond materials like **monographs**, **serials**, and **indexing and abstracting databases** may have unique licensing, access, and patron authentication requirements that differ substantially from traditional library resources. In particular, many do not offer a **single sign-on (SSO)** option but instead utilize token-based authentication where a single administrator adds patrons based on email address. It is essential that you ensure that the license explicitly discusses

Family Educational Rights and Privacy Act (FERPA) compliance and that it is clear how user data is stored and kept private.

Some of the broad categories that non-traditional online resources may fall under include:

- Case-based modules (e.g., Aquifer)
- Citation management tools (e.g., Endnote, Mendeley, Zotero)
- Curricular mapping software/learning management systems (e.g., Firecracker)
- Direct-to-consumer textbook platforms (e.g., VitalSource)
- Electronic platforms with ebooks, quizzes, slides, cases, and exercises. (e.g., Evolve)
- Evidence synthesis resources (e.g., Covidence, DistillerSR)
- Question banks (e.g., BoardVitals, USMLEasy, UWorld)

Further Reading

O'Hanlon, R., & Laynor, G. (2019). Responding to a new generation of proprietary study resources in medical education. *Journal of the Medical Library Association*, 107(2), 251. https://doi.org/10.5195%2Fjmla.2019.619

Shultz, M., & Berryman, D. R. (2020). Collection practices for nontraditional online resources among academic health sciences libraries. *Journal of the Medical Library Association*, 108(2), 253–261. https://doi.org/10.5195%2Fjmla.2020.791

Veterinary Medicine

Reviewed by Andrea C. Kepsel, MLIS, AHIP Veterinary Medicine Librarian, Michigan State University Libraries

Veterinary medicine libraries often rely on a mix of human and animal-focused texts for their students. Programs can have any combination of veterinary nursing, Doctor of Veterinary Medicine (DVM), PhD, and Master of Science (MS) degrees, and each requires specialized resources. The collections librarian may opt to purchase a title in both print and electronic formats since print copies can be loaned out through interlibrary loan (ILL) to practicing veterinarians, and the electronic format is often requested by educational programs. Many times a veterinary medicine library may be the only library that has specialized books that can be loaned to unaffiliated practitioners in the state or region, so having print copies can help support the profession in their area. Libraries affiliated with a veterinary medicine teaching hospital may also wish to collect select pet health care titles for clients who are visiting during treatment of their animals.

Online subscription databases (e.g., the British Small Animal Veterinary Association Library) and streaming media platforms (e.g., Veterinary Education in Video) are increasingly popular. There are also several subscription **point-of-care and diagnostic tools** available to libraries, such as Plumb's Veterinary Drugs and Vetstream.

Communities

- Medical Library Association's (MLA) Animal and Veterinary Information Specialist Caucus. You must be a member of MLA to join this caucus.

Further Reading

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Collection Considerations in Non-Academic Health Sciences Libraries

Reviewed by Erika Kirsch (UBC Pharma) and the leadership of the MLA Health Associations Caucus.

Non-academic health sciences libraries can be broken into three broad categories: health care corporations, health care associations (e.g., research institutes and medical societies), and hospital-based libraries. The job duties and collection breadth vary between organizations and can be quite expansive. The structure of hospital libraries may be more complex and are discussed in additional detail below this section.

The following factors may impact collections in all three library settings:

- Staffing
  - Librarians may work solo, with staff support, or with colleagues who have other professional backgrounds.
  - Is the librarian employed part-time? Are they on site? Do they have a role that is secondary to other responsibilities in the company?
- Reporting and budget structure
  - Reporting structures vary and may include the Chief Executive Officer (CEO), Chief Information Officer (CIO), or Information Technology (IT) as the direct supervisor.
  - How are information resources funded? Who approves the budget? Who licenses, orders, and pays for information resources?
- Mission of the library
  - Does the library serve or support the entire organization, or only specific chapters, units, divisions, departments?
  - Are there other sites, campuses, branches or offices that the library supports?
  - Does the library purchase or license specialized resources for individual departments?
    - There may be specialized resources to consider such as **HIPAA-compliant** research data repositories, pharmaceutical or chemical databases, business intelligence or marketing databases, bioinformatics, **Big Data**, patents, etc.
- Is there a consortia to help with purchasing and/or licensing?
- Is there a physical library?
  - How are print materials cataloged? Do you need to have an **OPAC**?
  - Does it include computer labs or other working spaces?
- Collection management considerations
  - Is the collection all online, only in print, or a mix?
  - How are the information resources made discoverable to those entitled to use them? For example, is there a library system, intranet, or **proxy access**?
  - Are the collections open to the public or for employees only?
  - How are the information resources promoted to the intended audience to ensure awareness of collection holdings?
- Other factors that may affect collection scope, decisions, and financing include whether:
  - The librarian is the chief copyright officer.
  - The library has company archival responsibilities.
  - The library or librarian is involved in the company's research or other competitive intelligence development, publications, peer review, marketing, education, etc.

Communities for Association and Corporate Libraries

- Medical Library Association's (MLA) Health Association and Corporate Libraries Caucus. You must be a member of MLA to join this caucus.
- Special Libraries Association's (SLA) Pharmaceutical & Health Technology Division. You must be a member of SLA to post to the division's email list, although their discussions are freely viewable online.
- American Association of Colleges of Pharmacy's (AACP) Drug Information and Library Science section. You must be a member of AACP to join this section.

References and Further Reading: Association and Corporate Libraries

Some of the articles in this section provide background information on non-academic health libraries and may not reference collection development explicitly. They are being provided because they may help you scope your collection development practice through a more thorough understanding of the corporate library context and culture.

American Library Association. (2021). *Setting up a library: Special and office library*. https://libguides.ala.org/SettingUpaLibrary/SpecialLibraryBlack, & Gabb, H. (2016). The value proposition of the corporate library, past and present. *Information & Culture*, 51(2), 192–225. https://doi.org/10.7560/IC51203Browne, B., & Martzoukou, K. (2022). An investigation into the information-seeking behaviour of professionals, working within the pharmaceutical manufacturing sector in Ireland. *Library Management* 43(5), 370-398. https://doi.org/10.1108/LM-11-2021-0099

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Young, R., Chou, B., & Benz, L. (2018). *Going global: 7 information management considerations to keep in mind* [PowerPoint presentation]. 2018 SLA Pharmaceutical & Health Technology Division meeting. https://connect.sla.org/HigherLogic/System/DownloadDocumentFile.ashx?DocumentFileKey=d3728f76-bafc-20aa-6ff0-75ab71d97a16&forceDialog=0

Hospitals

There are various types of hospitals that are differentiated by ownership models, funding sources, geographic location, trauma level, and whether they are teaching or non-teaching. More information can be found at Rasmussen University's website "Types of Hospitals: Your Go-To Guide for Deciphering Differences." Hospital librarians may have a number of additional responsibilities to traditional library work, such as being the director or administrator of continuing medical education, or serving as a member on quality improvement committees.

Some hospital-specific collections considerations include:

- The mission and role of the library in the hospital
  - Does the library provide information support to clinicians-physicians, nurses, other healthcare professionals, residents, researchers, patients, administrators, families/consumer health, the community, or others?
- Affiliations

    - Academic programs
    - Hospital corporations and systems
    - Government networks, e.g., Veterans Health Administration Medical Centers aka Veterans Affairs (VA) hospitals
    - Library consortia for purchasing, licensing, or education
        - For example, the Group Licensing Initiative from the Health Sciences Library Association of New Jersey (HSLANJ) negotiates licenses for 130+ hospital and medical institutions in the National Network of Libraries of Medicine's Mid-Atlantic Region (NNLM MAR) and Southeastern/Atlantic Region (NNLM SE/A).
- A central licensing point for resources
- Additional services centralized under the library such as audiovisual support, archives, Continuing Medical Education (CME) registry, etc.

Hospital libraries may also need to have policies in place for the circulation of their items to protect patients from hospital-spread infections. It could include a hand hygiene plan, a wipe-down procedure, guidance on when it is appropriate to throw out items because they cannot be fully cleaned, whether books need to be circulated in plastic bags, etc. Librarians and a hospital infection control team should develop a plan together.

Communities for Hospital Libraries

- Medical Library Association's (MLA) Hospital Library Caucus. You must be a member of MLA to join this caucus.

References and Further Reading: Hospital Libraries

Allison, A., Burgard, D., Clanton, C., DeSantis, M., Kendall, S., Van Keuren, L., & von Isenburg, M. (2021). Library services for associated clinical organizations: AAHSL task force report. https://www.aahsl.org/assets/2020-2021/ACO-TF/AAHSL%20ACO%20TF%20Report.pdf

This report investigates the policies and models used by Association of Academic Health Sciences Libraries (AAHSL) members that have been able to successfully provide library services and collections to hospitals, health systems, or clinics.

Allison, A. E., Bryan, B., Franklin, S. G., & Schick, L. C. (2020). Academic health sciences libraries and affiliated hospitals: A conversation about licensing electronic resources. *Journal of the Medical Library Association*, 108(2), 242. https://jmla.pitt.edu/ojs/jmla/article/view/625

Cisney, L. B., Hoover, B., & Thormodson, K. (2022). The technology, budget, and other challenges of growing health systems on academic health sciences libraries: A deeper dive. *Journal of Electronic Resources in Medical Libraries*, 1-26. https://doi.org/10.1080/15424065.2022.2113349

Creyer Heet, E. (2018). One library's story: Creating and sustaining a hospital library consortium for purchasing online journals. In S.K. Kendall (Ed.), *Health sciences collection management for the twenty-first century* (pp. 121-124). Rowman & Littlefield.

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Hammond, P. A. (2011). Immersed in patient care: Mission critical decisions for hospital libraries. *Against the Grain*, 23(6), 6. https://www.charleston-hub.com/2012/02/v23-6-immersed-in-patient-care-mission-critical-decisions-for-hospital-libraries/

Huffman, I. R., Martin, H. J., & Delawska-Elliott, B. (2016). Creating a library holding group: an approach to large system integration. *Journal of the Medical Library Association*, 104(4), 315. https://doi.org/10.3163%2F1536-5050.104.4.013

Kubilius, R. K., Gudenas, J., Schimming, L., Shank, J., Vaughn, V., & Nixon, N. (2018). Where are we? Providing information for the clinical enterprise. In B.R. Bernhardt, L. Hinds, & L. Meyer (Eds.), *Charleston Conference proceedings* 2017 (pp. 156). Against the Grain Media. http://dx.doi.org/10.5703/1288284316665

Rutledge, H. (2018). Diving into data: Analyzing information requests to understand information needs at a pediatric hospital. *Journal of Hospital Librarianship*, 18(4), 293-305. https://doi.org/10.1080/15323269.2018.1509190

Managing Relationships with Vendors

Keeping Track of Vendors & Representatives

Consider using a spreadsheet to keep track of your sales representatives, their contact information, and the companies they work for. Be aware that one vendor may have multiple representatives who represent different products. Additional contacts (e.g., technical support representatives) could also be included if you might need to get in touch with them more than once. Your contacts at a given vendor *will* change over time due to mergers and acquisitions or sales representatives being hired to work with a different vendor, and so regularly maintaining this list will be helpful.

Use your email client to your advantage. Create a folder structure organized by vendor and keep communications in there such as price quotes. You never know when you'll need to refer back to an email from several years ago!

Communicating with Vendors

Communicating with vendors can be stressful, especially for new collections librarians. It is important that you know your role and be able to articulate it. Do you recommend purchases; recommend and get quotes; or recommend, get quotes, and provide invoices and/or have signatory authority? Be clear about what you want, your role, and your expectations for communication from the vendor (e.g., frequency of contact and whether to reach you by email or telephone). A vendor may request to record or already be recording your virtual meeting when you join. You may request that your conversation not be recorded. You can choose to leave the meeting if they will not comply with your request.

You will find a communication style that works for you as you gain more experience. If you can, find a mentor to help you – especially at the beginning – to understand productive and professional ways to communicate with vendors. "No" is a complete sentence, and you do not need to give any other details to a vendor about why you do not wish to get or renew a product.

Exercise caution when providing information to vendors, and be clear on what kind of information you and your organization are comfortable sharing. For instance, should you keep private information about your budget, carry forward (unspent money from the current fiscal year that can roll over into the new fiscal year), options for end-of-year purchases, and patron contact information? You should also be aware that, unless you say otherwise, telling vendors in writing that you like their product could be considered an endorsement, so it is important to know if your organization is okay with being included in marketing materials.

Asking your supervisor questions is important. You should never make assumptions about what the vendor knows about your institution or what you are able to share with them. Do not over commit in writing before discussing potential purchases or subscriptions within the appropriate approval structures in your library. Always get quotes in writing and make sure they include any special addenda or terms, access length, and the annual renewal percentage if applicable. Do not hesitate to ask the vendor questions if you find anything confusing. It's important to make sure you clearly understand what's being purchased and under what terms.

Know the Details of Your Offers and Quotes

Depending on your organizational structure and role, you may not be the one who should be asking questions about a quote or contract – for instance, it could be a lead acquisitions specialist who is in charge of negotiating and finalizing the details – but it is good practice to know the basics of what needs to be discussed. If you are the person in charge of managing the quotes and contracts, however, you must ask clear, direct questions in order to negotiate the best deal possible, and to obtain information that may not be readily shared. Examples of important information you should ask for include but are not limited to:

- Contract length
    - Perpetual access, 1-year, 3-year, and 5-year terms are most common.
- Pricing, including annual increases for subscriptions
- Access modality
    - E.g., individual patron logins vs. group passwords vs. IP authentication/Single Sign On. For an overview of common authentication and authorization mechanisms used in academic libraries, see Carter and Hanson's white paper and webinar recording (2022).
- **Embargo periods** for any subscription-based license, not only e-journals
- Moving walls
    - Publishers may only allow access to their most recent content, such as the last 2-5 years from the most current date, with older content lost over time. This is referred to as a "moving wall" or "rolling access." Whether a subscription involves a moving wall will be explicitly stated in the contract.
- Perpetual access
    - Especially consider post-cancellation access to journal backfiles. CLOCKSS is only an option if the journal ceases publication.
- Interlibrary Loan (ILL) permissions
- Platform fees, license fees, other fees
- **Digital Rights Management** (DRM)
- Accessibility plans
- If applicable, the options for product updates
    - Are they included in the purchase/subscription price or are they an additional annual cost?
    - How is the pricing determined?

References and Further Reading

Albee, B. (2021). Library serials vendor relationships: The human element. *Against the Grain*, 31(2), 13. https://doi.org/10.7771/2380-176X.8344

Farrell, M., Kawecki, B., & Branham, R. (Eds.). (2018). Vendor library partnerships. *Against the Grain* (30)2. https://issuu.com/against-the-grain/docs/atg_v30-2

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Macy, K.V., Pike, C., & Ameen, M. (2021, May 4). Negotiations 101: How to conduct principled negotiations for library resources. [Online Presentation]. ACRL/SPARC Workshop. https://scholarworks.iupui.edu/handle/1805/25821

Macy, K.V. (2017, March). Creating relative bargaining power through information when approaching vendor negotiations. Poster presented at ACRL2017, Baltimore, MD. https://scholarworks.iupui.edu/handle/1805/12217

Ostergaard, K., & Rossmann, D. (2017). There's work to be done: Exploring library–vendor relations. *Technical Services Quarterly*, 34(1), 13-33. https://doi.org/10.1080/07317131.2017.1238196

Ostergaard, K., & Rossmann, D. (2015). Vendor relations strategies for libraries. *Against the Grain*, 27(6), 9. https://doi.org/10.7771/2380-176X.7222

Sowards, S.W., & Harzbecker Jr, J.J. (2018). Managing a collections budget. In S.K. Kendall (Ed.)., *Health sciences collection management for the twenty-first century* (pp. 83-120). Rowman & Littlefield.

Pages 111-117 cover negotiating with vendors as a part of the budget process.

Thomas, W. J. (2013). A beginner's guide to working with vendors. NASIG *Newsletter* (28):6, 5. https://tigerprints.clemson.edu/nasig/vol28/iss6/5

Licensing and Copyright

Most e-resource subscriptions will require a license agreement between the publisher/vendor and the institution the library serves. The license is a legal document between both parties that covers who can access what, for how long, and how materials may be used. The type of organization and for whom the resource is being licensed for use will, in many cases, affect the resource price. For example, academic-only use of a clinical resource is often less expensive than if it is licensed for clinical use as well.

Negotiating Licenses

The most important thing to know about licensing is that *you can negotiate the terms of the license.* If a vendor is unwilling to negotiate any terms with you, you may want to reconsider licensing that product. Negotiating is a skill that you develop over time. Also, you are usually not negotiating alone – often there are other library colleagues who would be a part of the negotiation process such as e-resources and licensing managers, collections strategists, legal counsel, and accessibility coordinators.

When negotiating licenses always consider the values and mission of your organization. Adding a license addenda regarding remediating content for user accessibility or asking if the resource is compliant with accessibility standards may be priorities for your organization. (Along those lines, the Triangle Research Libraries Network (TRLN) Guide to Negotiating Accessibility in E-Resource Licenses may be helpful to you.) Removing **indemnity clauses** or other license components that would put an undue burden on your institution can also be important or may be required. Removing and adding clauses and components of a license is necessary and expected. The original document provided by the vendor is a starting point.

An important factor for negotiating and managing licenses is to understand the organization you are serving. Are you negotiating solely for an academic institution or do you also need to provide access to a hospital or clinical professionals? Is the resource solely for hospital and clinical use? Will it be integrated with the Electronic Health Record system (EHR)? These latter situations may require close collaboration with health systems departments or divisions throughout the negotiation process.

Managing and Maintenance

Conducting a methodical review of current licenses is a process that might seem daunting but can be done as renewals come due. It may be tempting to just continue renewing if there have been no issues with the resource or the vendor but it is worth the effort, and it is good practice. Establishing priorities and identifying "deal breakers" can act as a checklist when reviewing current or new licenses.

Documenting licenses includes not only retention of the finalized agreement, but also the documentation of agreements and points of clarification that were shared verbally or by email. Capturing these exchanges and maintaining them in a shared repository will be greatly appreciated as time passes and there are staffing changes. Maintaining print documentation of these exchanges along with the final agreement may be worth considering as well.

Comprehensive Licenses, Amendments, & Common License Elements

A comprehensive license (sometimes referred to as a "master" license) may be an option when licensing several products from one vendor. This is one license that lays out all of the standard license terms and elements for content from that company. These are often 30 pages or more and may require approval from your institution's legal team.

When adding new content from the same vendor or new uses of existing content (e.g., including images in educational materials), instead of negotiating a new license, amendments (sometimes called an addendum) may be added. They do not repeat the boilerplate language from the comprehensive license. Amendments tend to be shorter and simpler than the comprehensive license, and are a quicker way to add new content with less "red tape", since a comprehensive license already exists between the organizations.

As legal and binding documents, a typical comprehensive license will include the following elements and terms, generally in the order listed below. Most of these terms are defined by LIBLICENSE.

- Parties to the agreement
- Definitions
- Description of licensed materials
- Delivery and access, including authentication
- Authorized patrons
- Authorized site or sites
- Authorized or permitted uses and any prohibited uses
- Licensor obligations
- Licensee obligation
- Mutual obligations
- Term of the agreement, including process for renewal and termination
- Warranties, indemnities, and limitations on warranties
- Financial exigency clauses
- Governing law and dispute resolution
- Non Disclosure
- Fees and payment (may appear in an attached schedule)
- Archiving and perpetual access
- Miscellaneous provisions, such as force majeure
- Signatures
- Schedules, such as fees and payment, detailed list or description of the content that is licensed, specific information about access and authentication (e.g., IP addresses), list of participating institutions if more than one
- Addenda

Open Access Agreements

cOAlition S and the Association of Learned and Professional Society Publishers (ALPSP) published a toolkit to foster Open Access agreements (April 2022) that includes sample licenses and a workflow guide.

Authorized Signatory

Most librarians will not have the authority to sign licenses on behalf of the institution and will need to work with a purchasing or legal department. However, it is still important for a librarian to review the license and negotiate terms related to use of the product since purchasing/legal staff members probably aren't well-versed in these areas. Their focus is on whether the license is in compliance with institutional and state policies.

Considerations for Public/State Institutions

Public and/or state institutions are usually subject to state laws governing contracts. Potential issues include:

- **Open Records**: Some states have open records acts that prevent public institutions from including non-disclosure clauses in licenses. Many vendors will ask to include a non-disclosure statement that prevents the library from sharing the terms of the license with anyone outside their institution in order to keep their pricing confidential.
- **Indemnification**: Most licenses will ask the institution to **indemnify** the vendor (see LIBLICENSE definition here). Many states have laws preventing institutions from indemnifying any vendor, so this clause will need to be removed.

Things to Consider

- **Avoid language** such as "warrants", "promises", "makes every effort" or anything that asks the library to police patron behavior. It is very difficult for any library to monitor what patrons are doing with licensed materials. In general, you don't want to include any terms that you can't enforce, but sometimes it won't be possible to remove them.
- **Interlibrary Loan (ILL):** Make sure you can provide material from the licensed product to other libraries via ILL, if appropriate. Avoid stating which ILL product you will be using (e.g., ILLiad), since systems can change over time. Most vendors will ask that you use a secure system. Make sure you have the ability to supply electronic copies (e.g., PDFs, TIFFs) of articles/chapters.
- **Course Reserves:** Make sure you have the ability to include materials in electronic course packs or on course reserves. You may also want to ask for language that allows materials to be posted on course management sites, such as Blackboard. Avoid mentioning a specific CMS/LMS as these can change over time.
- **Authorized patrons:** Ensure that all your patron groups are included in the authorized patrons section of the license. The default for most licenses will be affiliated patrons of the institution (e.g., students, faculty, staff). If you allow access to groups such as preceptors, private practice physicians, volunteer faculty, and/or alumni, you may need to request additional language that covers these patrons. However, be aware that adding more patrons may affect your resource cost. Walk-in patrons are another consideration; many times you will need to request language to allow access for unaffiliated patrons using resources within the physical library.
- **Method of Access:** The license should specify the manner in which your library can provide access, such as via IP authentication, username/password, or proxy server. Consider what is feasible for your library staff — IP authentication and proxy server access require some IT/systems support, but managing patron names and passwords can be very labor intensive for library staff. In most cases, you will want to use the same access method for all your e-resources to make things easier for your patrons. For an overview of common authentication and

authorization mechanisms used in academic libraries, see Carter and Hanson's white paper and webinar recording (2022).

- **Accessibility:** The license should include language about using reasonable means to make the content available to patrons, regardless of their perceptual abilities. This could be through built-in features, compatibility with other software, or through permission for the licensee to make the content available through other means. At a minimum, the license should include the right for the licensee to receive up-to-date Voluntary Product Accessibility Templates (VPATs) upon request. The license may make reference to Web Content Accessibility Guidelines (WCAG), Sections 508 and 504 of the Rehabilitation Act, or other guidelines.
  - The Big Ten Academic Alliance (BTAA) has standardized e-resource accessibility license language available.
  - See also the Triangle Research Libraries Network (TRLN) Guide to Negotiating Accessibility in E-Resource Licenses (December 2022).
- **Text or Data Mining rights**: Your institution's license should include a clause about how patrons can download massive quantities of information from e-resources for text or data mining purposes.
- **Shared licensing and consortial relationships**: If some of your licenses are handled at a consortial level, make sure you have access to a copy of the agreement. Typically, the consortia will task someone with reviewing the license on behalf of the group, and you may not see the license before it is signed.
- **Record keeping**: Keep a copy of the license, preferably the version that has been signed by all parties. In particular, the library should retain records that specify perpetual access rights, especially when the institution has a records retention policy that discards financial records after a given period of time. Many electronic resource management (ERM) tools allow you to track license terms.

Resources with Sample Contract Language

- American Association of Law Libraries' Principles & practices for licensing electronic resources (2018).
- Association of Southeastern Research Libraries' The ASERL Eleven: Recommended principles and terms for electronic resource agreements (2022). There is also a Google Doc version of the document for easy cut-and-paste of suggested contract language.
- Big Ten Academic Alliance's Library e-resource accessibility – Standardized license language (2022).
- California Digital Library's Licensing Toolkit (2019). Includes licensing and technical guidelines as well as information on cost sharing models.
- LIBLICENSE's Model License Agreement (2014) also includes links to other organizations' model licenses (last updated 2022). It may be useful to view their pages on licensing terms and vocabulary as well.

Online Courses for Professional Development

- Contracts and Licensing lesson from the Open Negotiation Education for Academic Libraries (ONEAL) project.
- Copyright and Open Licensing Issues in Libraries from Library Juice Academy.
- CC Certificate for Open Culture/GLAM from Creative Commons covers copyright issues for Galleries, Libraries, Archives and Museum as well as open licensing considerations.

References and Further Reading

Center for Research Libraries. (n.d.). LIBLICENSE. http://liblicense.crl.edu

The LIBLICENSE webpage includes links to publisher, author, and model licenses. You can also join their LIBLICENSE-L discussion forum to discuss the licensing of electronic resources by academic and research libraries.

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Chapter 5 covers vendor relations, negotiation, and contracts.

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Budget and Planning

Many factors affect collection budget and planning, such as the administrative structure of the library, funding sources, fiscal year alignment with the calendar year, and institutional financial management policies.

Budget Types and Fiscal Responsibility

The overall library budget usually consists of an operations budget and a capital budget. An operations budget includes expenses for the running of a library, such as personnel, technology, maintenance fees, and utilities. A capital budget generally covers fixed assets such as property and equipment. It is meant to be used for item improvements, replacements, and additions that are high cost. The minimal cost of something to be considered part of the capital budget is set by the fiscal authority that the institution or organization operates under. For example, they may stipulate that anything under $5,000 can be funded out of operations but over that amount would be funded out of capital.

In budgetary parlance, items that make up your collection are called “materials.” It covers all types of formats and resources in your library collection. Library materials funding can be a part of the operations budget or it can be separate. When it is part of the operations budget, materials and personnel can make up 80-90% of the operating budget as a whole.

In general, funds designated as part of the operations budget cannot be used for expenses in a capital budget and vice versa. The ability to carry forward any unspent funds from one fiscal period to the next will vary by institution.

Budget types

The type of budget used by a library will be influenced by the type of budget used by the parent organization. There are several types of budgeting that one may encounter in libraries. In general, only one type of budgeting will be used by a library. Below are the most common budget types you will encounter.

- Line-item: A listing of items of expenditure each with their own dollar amount that, when added together, represent the total expenditure.
- Lump sum: Allocation of an amount of money with no specific line items.
- Program/Performance: Links budgeting to organizational objects.
- Formula-based: Allocation based on objective quantitative criteria based either on historical allocation or formulaic projections.

Budgeting methods

- Baseline budgeting: Uses the previous year’s allocation to start and is modified by forecast data and expected changes, such as changes to the patron population or demand for resources.
- Zero-based budgeting: Starts at zero dollars and adds dollars correlated to specific programs and activities.

Staff involved in collection budget planning need to understand the library’s methodology used to calculate expenses, projections, and encumbered and free funds. They should also understand the role of special funds or **endowments** as they affect the collection budget.

Funding Sources

The main source of library funding is usually an appropriation from the parent organization. Of note, funding for library materials is often considered a protected category inviting extra inquiry about how it is allocated and spent.

Other funding sources may include:

- Cost sharing with departments outside the library
- Donations
- **Endowment** income
- Grants from parent or outside organization
- Fees and charges for services
- Fines
- Fundraising (including Library Friends groups)
- Sponsorships

Accountability of how budgets are allocated and spent is extremely important. Demonstrating effective stewardship of funds received is often a core library mission. Organizations may require metrics to show how the budget is being used and its impact on the mission and/or values of the institution.

Grant Funding for Collections Content

Receiving grant funding is one way that libraries can purchase content that is not covered by a given budget. Although this option only provides one-time funding for titles, grants can be helpful for developing or expanding collections that are more likely to maintain their relevance after a few years (e.g., memoirs, graphic medicine), or to experiment with new content, formats, or platforms.

Prior to applying for a grant, you will want to speak with your manager and your institution's Office of Sponsored Research (or similar department, if available) to get their support and ensure that you will not run into any organizational conflicts. For example, sometimes an organization can only submit one grant application to a funder, or an institution may not permit librarians to be Principal Investigators (PI) for grant applications. The Office of Sponsored Research is also a good place to start if you are interested in learning about places to look for possible internal funding sources. As for external funding, the following organizations are good places to begin looking for grants that support purchasing collections content:

- Network of the National Libraries of Medicine (NNLM): Funding Opportunities
- Institute of Museum and Library Services (IMLS): Grants
- Grants.gov
- American Library Association: Grants

It is also worth checking to see if your state library association offers grant funding. Other general databases you can search for grant funding include DEMCO (free), Foundation Center ($), Pivot-RP ($), and SPIN ($).

Below are some general tips when applying for grants:

- Pay attention to return on investment.
    - Is the amount of work required to apply worth the amount you will receive?
    - If you get the grant, is the volume of documentation you will need to submit worth the amount you received?
- Make clear how your application aligns with the grant or organization's intended purpose, in part by incorporating their keywords.
- Provide quantitative and measurable data whenever possible.

Allocating, Expending and Monitoring

How the materials budget is divided up varies from library to library. Typical line item allocations include:

- Subject or discipline
- Location (e.g., branch library)
- Type of patron
- Format or genre (e.g., monographs, reference materials, backfiles)
- Type of publisher (e.g., trade presses)
- Support tools and services (e.g., MARC records for cataloging)

It is important to monitor budget expenditures and balances regularly as mid-year adjustments to spending may be necessary to ensure all funds are spent by the end of the fiscal year.

Preparation and Presentation

At its most basic, a budget represents the funding needed and how it will be spent in one fiscal year. Multiple scenarios at various funding levels (i.e., specific percentage increase, flat funding, or specific percentage decrease) may be requested by organization leadership to present to funding administrators for consideration. Providing different scenarios can help highlight the consequences of flat and reduced budgets, especially if specific resources can be identified that would likely be cut due to lack of funding. Some institutions will require an annual expenditures report that includes sections on expected budgetary increases and new expenditures.

Budget terms can vary depending on the organization. They range from a fiscal year (July 1 to June 30), to the calendar year (January 1 through December 31), and in some cases it may begin with October 1 and end on September 30. Knowing when your budget begins and ends is important for collection development librarians because it impacts when you can purchase items and your planning for next year's budget. For example, it can help you get quotes for new resources before the new fiscal year budget is locked in so you can add them to your line item expenditures.

Forecasting and Decision Support

When preparing a budget, it is recommended that you familiarize yourself with sources that annually summarize current price trends into indices. These indices provide tables and analysis that measure changes in average U.S. serials prices within a historical context. The annual "Periodicals Price Survey," published annually in April by *Library Journal*, forecasts serials inflation rates for the coming year. Additional helpful resources include:

- *The Library and Book Trade Almanac* (formerly known as *The Bowker Annual*), published by Information Today, Inc. This title includes the "Prices of U.S. and Foreign Published Materials" which is also available on the ALA website.
- The "Periodicals Price Survey" published annually in April by *Library Journal*.

You will also know from your licenses how much a subscription will increase every year. This annual percent increase should be factored into forecasting your budget. The annual percent increase of a serial can often be negotiated to be lower than the initial offer, especially if you are willing to consider a multi-year deal. Your institution may, however, set a threshold for the percentage and not allow you to purchase resources that increase more than a specific amount annually.

Systems and Processes

Staff involved in collection budget planning need to understand:

- The library and institutional system used to track the budget (e.g., ILS, institutional financial system, spreadsheets).
- The budget approval process and who ultimately approves the budget.
- What types of reports and data points are needed for library or institutional administration.

Note that collections-specific budget tracking records or spreadsheets are often kept separately by the library or collections department.

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Cooperative Arrangements and Consortia

Cooperation and collaboration have long been traditions in libraries of all kinds. Cooperative arrangements may be in place for a variety of activities and services, but the focus of this section is on arrangements that are agreed upon in order to share the responsibility of collection development and management.

Types of Arrangements

- Internal partners
  - The library shares the cost and/or administrative burden of a resource with another department within the same institution. A **Memorandum of Understanding** (MOU) can be helpful in this instance but is often not required.
    - *Example*: The library helps evaluate and renew a pharmacy database subscription on behalf of the School of Pharmacy. The library charges the school annually for the subscription cost while managing access for the whole campus. This type of arrangement can be very helpful when funding policies or budget challenges limit collections in certain areas.
- External partners or affiliations
  - The library shares the cost and/or administrative burden of a resource with a separate university, hospital, business, government agency, or entity. Usually a Memorandum of Understanding (MOU) between the library's institution and the other entity is required and will determine the reasoning for and limits to this relationship.
    - *Example*: The library's institution and the Department of Public Health (DPH) have a longstanding relationship and created an MOU that states that the library will manage a hospital library on DPH's behalf. The annual budget is provided by DPH and resources are only available to DPH employees.
- Regional partners or affiliations
  - Academic institutions in a region (e.g., local, county, state) may sign **reciprocal borrowing** or interlibrary loan agreements with one another, without being part of a consortia. For example, this may take the form of local colleges and universities having reciprocal borrowing privileges, or members of a state health sciences libraries association providing each other reduced cost or free ILL.
- Library consortia
  - A group of libraries, typically across a defined geographic area, that participate in collaborative collection development in order to reduce redundancies and achieve cost savings. Consortial membership can either be voluntary or required, depending on the mission of the consortium and participating institutions. Likewise, participation in consortial subscriptions also varies by consortium: some allow members to opt out of subscriptions they do not wish to subscribe to while others require members to subscribe to all negotiated resources.
    - *Examples*:
      - Big Ten Academic Alliance (BTAA)
      - Boston Library Consortium
      - California Digital Library (CDL)

Best Practices for Cooperative Arrangements

- Ensure that the arrangement is mutually beneficial to all participating parties.
    - A common guiding principle for consortia is to ensure that no member institution pays more for a resource through the consortium than it would by subscribing as an individual institution.
- Create a written agreement so guidelines, restrictions, and rights are known.
    - Make clear what is opt in and opt out.
    - Make deadlines for actions like activation and renewals clear.
    - Ensure each member has a vote on what resources are part of the agreement.
- As much as possible, centralize and reduce redundancies in the licensing, cataloging, access maintenance, billing, and payment processes.
- Seek legal expertise for the partnership agreement itself and resource licensing issues.

Communities

- International Coalition of Library Consortia (ICOLC)

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Interlibrary Loan and Document Delivery

A library's interlibrary loan (ILL) department serves its patrons by obtaining copies of materials not owned by the library. This is accomplished in two ways: 1) interlibrary loans in which print materials in their entirety are borrowed for patrons from outside libraries for a certain amount of time; and 2) document delivery in which digital or physical copies (most often journal articles or book chapters) are obtained for patrons from outside libraries, publishers, or vendors. Both processes may be free of charge to the borrowing library or require payments depending on which ILL system is used. Some institutions charge users for ILL, while others do not. Institutions that do not charge for ILL recover the cost in other ways, such as adding its cost to their overall operations budget.

ILL Systems

Most libraries use an ILL system for their ILL activities. The majority of health sciences libraries participate in DOCLINE, which is an online ILL request routing system that is created and managed by the National Library of Medicine. Within DOCLINE, many health sciences and hospital libraries participate in reciprocal borrowing agreements with other libraries to reduce overall costs. In these agreements, libraries provide materials free of charge to the other reciprocating libraries.

In addition to DOCLINE, larger health sciences libraries often utilize other ILL systems. They may participate in OCLC's ILL system and/or regional ILL consortia (such as UBorrow for the Big Ten Academic Alliance). These libraries must use commercial ILL software (e.g., ILLiad or WorldShare Management) to manage their ILL activities. There are commercial software applications that allow libraries to manage their DOCLINE activity alongside other ILL activity with one software application.

There may also be state, regional, or consortial borrowing systems available to your institution. Examples include the MeLCat statewide library system and the Big Ten Academic Alliance (BTAA) UBorrow service.

Copyright – Brief History and Practice

Copyright plays an important role in ILL and collection development. ILL staff should have a basic understanding of copyright laws, **CONTU** and alternative guidelines, and the details of licensing agreements pertaining to ILL for the resources they license. It is helpful for collection development librarians to have some knowledge of these topics too, since they can impact your collections decisions.

In the early 1970s, the National Commission on New Technology Uses of Copyrighted Works developed a guideline that calls for libraries to pay copyright fees after they exceed borrowing 5 articles published within the last 5 years from the same journal. This is called the "Rule of 5" or CONTU limits. While the guidelines were never formally adopted by the US government, many libraries today still follow them. Once a library reaches the CONTU limits for a journal, articles can be purchased through the Copyright Clearance Center (CCC). CCC collects copyright fees on behalf of publishers and adds it to their own processing fees. Articles can also be purchased directly from publishers whose prices include copyright fees.

Commercial ILL software helps libraries comply with copyright guidelines by tracking the number of requests for each journal title each year and flagging requests that exceed CONTU limits. They can also connect to the CCC to provide copyright fee information and track total copyright fees paid for requests from the same journal. This is not a service that DOCLINE provides.

Many in the library profession question the relevancy of CONTU guidelines, which were written over 40 years ago. Some libraries have begun to develop their own guidelines for when to pay copyright fees versus subscribing to a journal. In 2020, the Association of Research Libraries published a formal white paper that concluded CONTU guidelines are not appropriate for modern ILL activities in today's research and publishing world and offered suggestions for libraries wishing to move away from CONTU (Oakley 2020).

Some libraries have moved away from CONTU and the "Rule of 5" by paying copyright fees once per year rather than on a per-transaction basis. A global analysis of annual borrowing can weigh many factors including subscription costs, frequency and patterns across journals, requesting patrons, and it can help identify one-time spikes (i.e., one requester making all requests for articles in one journal). Choosing a number higher than five is also favored. Focusing on journals that have had 20 or more requests in a year, for example, could provide a good starting point to analyze a library's borrowing patterns. Lastly, many libraries are applying fair use to justify more of their overall borrowing, since fair use is written into the law while CONTU is not.

ILL Data and Collection Development

ILL data provides a rich source of information about what a library's patrons need that the library is not providing. An annual examination of ILL data can provide insights useful for collection development. Libraries can establish thresholds, guidelines, or processes for when and how ILL statistics might trigger the purchase of a book or journal subscription:

Conducting the evaluations listed below may be helpful for identifying titles to add to the collection.

- Which print books were frequently borrowed through ILL?
- Is there significant document delivery volume for an unlicensed journal title?
- What is the total cost paid for articles from an unlicensed journal?
- Looking at the publication year data from journal article ILL requests, are there potential candidates for a backfile purchase?
- Identify a new area of focus for clinicians and researchers in the institution using ILL data.

Considerations for Collection Development

Libraries cannot make decisions to add books and journals to the collection based on ILL activity alone. It is critical to examine the costs to license journals and books as well. In particular, the items listed below are worth considering.

- Some medical journals are so costly to license that paying ILL fees (e.g., copyright and other fees) may be more cost effective.
- By contrast, some journals are inexpensive enough that it does not take many document delivery requests to make licensing cost effective. However, the decision to add a title must consider if the journal is in scope, does not have high value, or if all/most of the document delivery requests were made by a single patron.
- Journals that many departments are interested in may be stronger candidates for adding to the collection than journals with narrower focus. An analysis of who is placing the requests can show the breadth of interest within an institution across disciplines and departments for a journal.

- An unlicensed journal with a high request volume may still not be worth adding if the integrity or quality of the journal is not high (e.g., predatory journals).

Communities

- Medical Library Association's (MLA) Resource Sharing Caucus. You must be a member of MLA to join this caucus.
- The DOCLINE-L Email Discussion List is a great place to ask ILL questions, troubleshoot, and request challenging-to-find items. The community is extensive and active. The National Library of Medicine (NLM) also posts its announcements for DOCLINE maintenance and upgrades to this list. You can sign up at https://public.govdelivery.com/accounts/USNLMOCPL/subscriber/new
- New health sciences librarians should know their National Network of Libraries of Medicine (NNLM) regional library. The regional NNLMs are available to help on any topic, and can train and troubleshoot for DOCLINE, PubMed, searching, and more.

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Open Content and Deposition of Materials

Open Access (OA) materials, also known as open content, are freely available online. Open Access is most closely associated with scholarly journal content but can also be used for books, videos, and other types of materials. Both the copyright holder and publisher agree in advance to make that content freely available. The agreement may allow content to be accessible on the publisher's site and/or through a different system, such as an open access repository, institutional repository, or an archive. To be truly open, the agreement needs to allow unrestricted reading, downloading, copying, sharing, printing, and linking. Some copyright holders may meet some of those requirements, but not others. SPARC's "How Open Is It?" is a useful tool for evaluating the level of open access.

Open content provides opportunities and pitfalls for libraries. Libraries may choose to incorporate open content in their collections and Online Public Access Catalog (OPAC). An institution's authors may rely on the library for help funding their open access publication, deciding where to publish, or how to create open content. Each library will need to make its own decisions about the role of open content in its collections, services, and budget lines. The variety of open access options and ways to deposit open materials can be challenging. Collections librarians, copyright librarians, and scholarly communications librarians all have overlapping responsibilities. They will need to decide how to divide up those responsibilities.

Journals

Types of Journals

Subscription/Toll-Access Journals

A subscription or toll-access journal makes its content available to readers for a fee. Collections librarians use the terminology "subscription" journal whereas "toll-access" is more common in the scholarly communications field. In this model, either the individual reader or the reader's institution pays a fee to access the content. Readers and institutions can subscribe to the journal ahead of time to access all the journal's content on a rolling basis or they can pay a fee per article.

Some subscription journals make select content available for free at times. A journal may make one issue freely available as a sample to entice potential subscribers or it may make articles about a certain topic temporarily free. For example, at the beginning of the COVID-19 pandemic, many publishers made articles about viruses, vaccinations, and public health responses freely available. Additionally, some journals only require payment for their newest articles. Those journals make articles free to read after a set period of time, such as after 6 months or a year. This is known as an embargo period.

Open Access Journals

There are several types of open access models. They are often labeled with a color to denote how open they are. The nuances of open access models/types are most often the concern of a scholarly communications librarian. Wikipedia lists the color and descriptive language for each model.

An open access journal uses a similar editorial, submission, and evaluation process to a subscription journal. To make the published article freely available to readers, many journals charge the authors a publication fee. This cost recovery method is called an Article Processing Charge (APC). Some libraries or institutions offer open-access publication funds or have fee reduction agreements/memberships with journals and publishers that cover APC costs for authors. Authors may also use grant funds to cover this cost.

Hybrid Journals

A hybrid open-access journal includes both subscription articles and open access articles. Authors have the option to pay a fee to make their articles open access or, if no fee is paid, then their articles will reside behind a paywall. Some argue that hybrid journals are "double-dipping" by charging article processing fees for authors while still charging libraries for subscriptions. Publishers counter that they factor the amount of open access for individual titles into their subscription pricing model.

Since 2018, an international group called cOALition S has been heavily advocating that publishers transition to immediate open access. In the meantime, hybrid journals still play an important role. Many academic faculty prefer publishing in hybrid open-access journals because the journals are usually more well-known and have higher impact factors. Some publishers also use the hybrid model as an intermediary step before moving the journal to a fully open access model. For an institution, one way to move a journal from a subscription or hybrid journal to an open access model is to engage in a transformative agreement. More information on transformative agreements can be found in the next section.

Open Access and Library Budgets

Institutional Memberships and Open Access Funds

Some OA publishers offer institutional memberships that eliminate or reduce APCs for authors. Examples include BioMed Central, PeerJ, and PLOS. Institutions sometimes pay for these memberships out of library collection budgets, research funds, or consortial agreements. Before purchasing a membership, consider the number of faculty you have that could potentially publish in those journals, as well as how many have published in the past. For instance, if the membership costs $10,000 per year and provides a $1,000 discount to authors, your institution will need to have at least 10 publications before breaking even on the deal. These factors should inform the agreement terms and pricing.

As an alternative to institutional memberships, some libraries offer OA funds to provide authors with assistance in paying for APCs. In this model, the library designates a certain amount of funding to pay for OA publication fees. This funding may come from the collections budget. The library will often determine the criteria authors need to meet in order to qualify for the funding. Some institutions choose to limit funding to junior faculty or to those faculty who do not have grant funding. Additionally, some libraries only pay APCs for certain journals and may exclude predatory or even hybrid journals. The library will need to set clear criteria for evaluating the journal in which its authors want to publish. Many libraries have established these funds and then later had to cancel them due to declining budgets or an unmanageable jump in applications and expenses.

Examples of Library Open Access Funds:

- University of Arizona's Open Access Investment Fund
- University of California Davis's Open Access Publishing Support

Transformative Agreements

As the demand for open access publications (both from funders and governments) increases, more libraries and publishers are signing transformative agreements to try to move toward open access publishing. Transformative agreements incorporate rights to publish as well as rights to read content. This is in contrast to traditional subscription agreements which only cover the ability to read the journal's content whereas publishing open access in that journal is a separate fee. Transformative agreements are called Read-and-Publish or Publish-and-Read agreements, depending on the emphasis of the agreement. With Read-and-Publish agreements, the institution pays for reading journal content and also covers some or all publishing/APC fees. In Publish-and-Read agreements, only publishing/APC costs are paid and reading is free.

Predatory Publishing

The emergence of Open Access publishing has given rise to unscrupulous actors who attempt to exploit the pressure on researchers to publish. They collect money from authors without performing most or any of the tasks that reputable publishers do (e.g., peer review, editorial oversight, vetting conflicts of interest). They also utilize the common practice of not allowing authors to submit works to multiple journals and hold their work hostage until a fee is paid. When deciding to add a journal subscription to your collection or link to open access content, it is important to determine if the content is **predatory**. Even journals listed in PubMed Central can be predatory or low quality journals published by well known and well-resourced publishers. Think. Check. Submit. offers a useful checklist of items to consider when determining whether a journal is predatory.

Pre-Evaluated Lists

There are a few sources that evaluate open access publications and have created lists of "approved" and "not approved" resources. A subscription to these tools may be requested from the collections budget to support scholarly impact and research credibility. Cabells is one well-known subscription resource. Each source uses their own criteria to vet titles and decide which are reputable and which are predatory. Maintaining them is a lot of work and they can become outdated quickly as new publications start fairly frequently, and publishers may change their business practices. These types of lists are helpful tools but they should not take the place of researcher or librarian critical appraisal.

Repositories

Open access repositories and archives allow copyright holders to upload their content and make it freely available.
There are two main types:

- An institutional repository is created and hosted by an academic institution for their students and researchers to deposit their content only.
- A disciplinary repository, on the other hand, hosts materials from people at many different institutions about the same theme, subject, or discipline (e.g., medRxiv, Dryad).

An archive collects and preserves information about an institution or organization. It can have both physical materials and digitized versions of those materials. All of these tools make it easier for people to learn about an institution and benefit from the work of people at the institution. They do not usually include a peer review process. Repositories and archives can host many different kinds of content, such as conference presentations, theses, preprints, and published articles. Libraries can encourage people at their institution to add their content to a repository.

Collections librarians may decide that they do not need to subscribe to a particular title if enough of its articles are freely available in a repository. Libraries can also link to these materials in their systems to enhance the content the library pays for. License agreements may include sections about adding content from that publisher to a repository.

Preprint Servers

Preprint servers are another way that researchers can make content freely available, outside of what would be traditionally referred to as open access. Researchers post their manuscript to a preprint server before it goes through the traditional publishing process. It is a way to share important findings quickly, because the publication process can be slow, and receive feedback prior to manuscript submission. Preprint servers often focus on a particular discipline. For example, there are preprint servers for health sciences (e.g., medRxiv.org) and biology (e.g., bioRxiv.org). Preprints have become more influential in health sciences in recent years, particularly due to the COVID-19 outbreak. PubMed now includes content from preprint servers.

Linking to preprint servers is another way that collection development librarians can enhance their libraries' paid collections. Preprint servers can be supplemental resources for content the library pays for.

Open Educational Resources

Open Educational Resources (OER) are open access materials that are specifically created for and used in educational contexts. They may be presentations, lesson plans, videos, textbooks, or virtual simulations. Because these resources are open, they can be reused, adapted, and mixed with other materials. Each institution can customize the resource for their own needs. That customization is helpful but can also lead to a proliferation of different versions that can be overwhelming to consider. With health sciences content, currency and quality are especially important to consider.

With respect to collection development, OER can be included in your Open Public Access Catalogs (OPACs) and the collections budget might be used to provide grants to faculty creating OER materials. They can be a component of the library providing course content to students and encourage collection development librarians to find complementary materials to add depth and breadth in areas not well covered by OER texts. OER, as a term, can be juxtaposed with "affordable course content" which usually refers to books, ebooks, or other content used in courses that the library pays for and students access with no additional charges.

Collection development librarians may consider adding selected open educational materials to their collections. The materials may replace or enhance the content the library pays for. For example, some publishers do not provide institutional subscriptions to their ebooks. Collections librarians may consider comparable open textbooks instead.

Finding the right OER for a specific need can be time consuming. To help get you started, Fox Valley Technical

College's guide lists some health sciences OER resources; Washtenaw Community College has a multi-subject OER guide; Red de Repositorios de Recursos Educativos Abiertos CVSP / BVS has a collection from Latin America and South America (mostly written in Spanish or Portuguese); and Open RN includes nursing OER textbooks with associated virtual reality simulations.

Adding Open Access Items to Your Collections

Libraries need to decide what Open Access material they want to make findable through their OPACs. Collection development librarians can be a part of the discussion regarding what to include in the catalog. For example, collections librarians may select specific journals or open access text repositories (e.g., HathiTrust) to include. When deciding to add OA materials to your collections you should investigate if MARC records or links to content are available from the vendor/publisher. Many OA platforms, such as the Directory of Open Access Journals, have metadata ingests for library OPACS. They may also be available more directly as an option to 'turn on' in your knowledge base with no external ingest of records needed.

Online Courses for Professional Development

- Creative Commons Certificate for Librarians is a course on open education and open access from Creative Commons.

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Communication and Outreach Considerations for Collection Development

Successfully communicating about collection ideas and decisions requires establishing community relationships, building internal trust, good storytelling, and an effective overall communication strategy at your library (McClung et al., 2017). This section will cover some of the basics of each topic.

Engaging with and Encouraging Patron Participation in the Collection Development Process

Ensuring that many opportunities exist for patrons to communicate with the library is essential to building a strong relationship between the library and its patron community. A healthy relationship between the two can facilitate both better collection development and increased support from the community when difficult decisions need to be made.

There are multiple strategies that can be employed to engage with a library's patron community. Some of them can be set up to solicit feedback passively, while others require a more active approach.

Strategies for collecting feedback passively:

- Embed purchase request forms on digital assets (e.g., websites, online subject guides) so that patrons can easily request resources for inclusion in the collection.
- Monitor publisher-provided statistics to determine usage trends.
- Consider whether Patron-Driven Acquisition (PDA), also known as Demand-Driven Acquisition (DDA), makes sense for your library. This approach allows you to purchase materials when it is clear that a patron wants them. This topic is covered more in depth in the section on Ebooks and Print books.

Active strategies for collecting feedback

- Set up or obtain feedback from student, faculty, and friends-of-the-library advisory groups.
- Conduct in-person interviews and focus group sessions.
- Send out surveys.
- Ask outreach and liaison librarians for feedback from their patron communities.

SPARC's webpage on "Strategies for effectively engaging stakeholders in negotiations" lists resources to help guide licensing negotiations and cancellations, such as roadmaps, library communications, presentations to upper level administration, and more. For major online journal cancellation projects, the University of California's "Communications planning and execution" section of their publisher negotiation toolkit offers useful guidelines on how to craft an effective communications strategy.

Building Internal Trust

Communicating regularly and transparently with others at your library is essential for soliciting feedback during the decision-making process, for building trust in the decisions that are being made, and for ensuring that collections-related messaging to the library's patron community remains consistent (McClung et al., 2017). It will help you work more effectively with your colleagues and with library administration.

Some of the frameworks that can be implemented to assist with building internal trust include: creating a cross-departmental collections standing committee, creating collections-related discussion and learning groups for liaison librarians who have collections responsibilities (McClung et al., 2017), or creating a community of practice (Pascual et al., 2019). For librarians whose primary responsibility is collection development, scheduling regular one-on-one collections meetings with liaison librarians and regularly attending liaison meetings can be helpful (McClung et al., 2017).

Storytelling

Being able to effectively and consistently communicate a collection-related decision, situation, or the value of your collection is just as important as doing it regularly and transparently. If your colleagues, library administration, or library patrons are unable to understand what you are trying to communicate, then they may not be able to provide you with the support you need, and trust can be diminished. Your internal stakeholders (e.g., administrators, liaisons) as well as your external ones (e.g., clinicians, students) probably have limited time and being able to communicate your message quickly but effectively is critical.

Consider the following when you're communicating collections information:

- Are you communicating plainly (i.e., no jargon)?
- Does it make sense to use visuals like infographics or data visualizations to communicate your story? If so, are they easy to understand at a quick glance?
- Can you share case studies or specific examples of the situation to help you illustrate your message?
- When advocating a position to library administration or other management, communicate how your position connects to the university's mission statement, if it makes sense to do so.

Embedding Collection Development in a Library's Communication/ Marketing Plan

A library's overall communication or marketing plan should include considerations for how it supports collection development through promotional efforts. It should include guidance on how to promote new or underutilized resources to the community, as well as how to manage discontinued, canceled, or de-accessioned resources.

Collection development personnel should work closely with their library or institution's designated outreach and marketing support personnel to establish goals and expectations related to resource promotion. For instance, the following could be considered:

- Which print and digital assets are appropriate for promoting library resources?
- How will new resources be promoted in a timely manner?
- Who are the key stakeholders and patron groups for different types of resources?
- How are you reaching underrepresented populations?
- Are the proper institutional brand guidelines being applied when applicable (i.e., which resources allow for co-branding, and are library logos and identity symbols being properly used)?
- Are there library resources that can be promoted alongside library events (e.g., cardiovascular resources during

American Heart Month)?
- Are there written communication templates available (for print or digital) that utilize the library or institution's branding?

If the library does not have an overarching communication or marketing plan in place, a collection development workflow should also include the following considerations:

- Who is responsible for communicating changes to the Library's collection?
- How are you documenting and sharing internally that new resources are available? (Some sample approaches include reporting on new items through meeting minutes or internal blog posts, emailing relevant subject librarians, etc.).
- Are you utilizing multiple marketing approaches to reach your library's patrons, including underrepresented populations?
- If a patron requests a resource, is the patron being informed once the resource becomes available in the library's catalog?
- Are consortial partners being made aware of new resources you've purchased which they may now have access to?
- If a resource is removed from the collection, what is the process for communicating that change?

It is also important to try to evaluate the effectiveness of your marketing efforts whenever possible and to consider alternative methods if needed (McClung et al., 2017).

References and Further Reading

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Collection Development Staffing Models

There is a great deal of institutional variation in the titles, professional training, and duties of staff involved in collection development and management activities. Administrative structures also vary depending on the type of library. This section will explore common staffing models in academic libraries. Collection development tasks overlap with those that occur in non-academic health sciences libraries, and staffing models will vary depending on the size of the institution. Many non-academic health sciences libraries are run by a lean staffing model where the tasks assigned across divisions and units in an academic library are done by a single person.

Academic libraries usually have several departments or staffing units involved in collections. Employees are usually a combination of librarians and support staff. These can include the **selectors** who decide on what to collect, acquisitions staff who process payments and invoices, licensing and records management who ensure records are loaded and all purchasing licenses are appropriate and signed, technical services or cataloging staff who make sure the records are accurate, and staff who ensure online materials are appropriately routing through authentication systems (e.g., **single-sign on**) and other IT concerns.

Liaison librarians may also have collection development responsibilities, having direct purchasing power or only recommending purchases to a collections librarian who is in charge of final decision making and purchasing. Liaisons may be assigned to a specific department, unit, or college. Armstrong (2020) has a training guide for liaisons performing collection development work. Individual institutions may also have specific liaison competencies that include collection development.

Some health sciences libraries run independently with all of those departments contained within them, while others are integrated into a bigger system and the technical services components of collections development are performed centrally. In the latter scenario, only selection may take place at the health sciences library building. At other institutions, there may only be one or two employees who are health sciences subject experts within a general academic library setting. Additionally, collection development staff may have responsibilities such as managing open access funds, overseeing the institutional repository, serving as a scholarly communication liaison, and more.

Competencies for Collection Development Staff

- Medical Library Association. 2017. "MLA Competencies for Lifelong Learning and Professional Success." [Competency 2: Information Management]
- The ACRL "Competencies for Special Collections Professionals" part III A. Collection Development contains a list of core competencies for a librarian participating in collection development of a special collection, such as medicine.
- The RUSA "Guidelines for Liaison Work in Managing Collections and Services" provides guidance for the liaisons to carry out their collection development tasks.
- The Ohio State University Libraries' "A Framework for the Engaged Librarian: Building on our Strengths" contains lists of competencies and best practices for subject specialists in academic libraries.

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Professional Development

Professional Organizations & Conferences

The following is a list of organizations and conferences that are particularly relevant to health sciences collection development. The organizations all have annual conferences and service opportunities for members. Costs vary to attend conferences and membership dues range.

Medical Library Association (MLA) (www.mlanet.org)

"Since 1898, MLA has fostered excellence in the professional practice and leadership of health sciences library and information professionals to enhance health care, education, and research throughout the world." The annual meeting for MLA is the premier conference for health sciences librarians. Topics of posters and presentations vary but there is usually come collection development content. The conference includes a large number of health sciences collections-focused vendors and this can be a good opportunity to learn about new resources. MLA members can volunteer to participate in committees, scholarship juries, and task forces to work on special issues. There are also communities and caucuses focused on specific interest areas, such as the Collection Development caucus and Technical Services caucus. Communities and caucuses also offer leadership positions and committee work.

The Acquisitions Institute at Timberline Lodge (http://acquisitionsinstitute.org)

"The Acquisitions Institute at Timberline Lodge is a library conference that has been providing an opportunity for acquisitions and collection development for librarians, vendors and publishers to meet and discuss pertinent trends and issues in libraries since 2000." This is an opportunity for acquisitions and collection development librarians, vendors and publishers to meet and discuss pertinent trends and issues in libraries. Registration is capped.

Charleston Conference (https://www.charlestonlibraryconference.com)

"The Charleston Conference is an informal annual gathering of librarians, publishers, electronic resource managers, consultants, and vendors of library materials in Charleston, SC, in November, to discuss issues of importance to them all." This is a key conference for collection development librarians and vendor representatives, focused on acquisitions, collection development, and technical services, but may include topics from outside these areas. Attend the Health Sciences Lively Lunch to meet with other health sciences librarians

Core (formerly known as the American Library Association – Association for Library Collections and Technical Services, ALCTS) (https://www.ala.org/core)

A division of the American Library Association, "Core: Leadership, Infrastructure, Futures is the national association that advances the profession of librarians and information providers in central roles of leadership and management, metadata and collections, and technology." This group provides community and continuing education on a variety of topics including collection development.

Electronic Resources & Libraries (ER&L) (https://www.electroniclibrarian.org)

"The goal of the ER&L Conference is to bring together information professionals from libraries and related industries to improve the way we collect, manage, maintain, and make accessible electronic resources in an ever-changing online environment."

NASIG (http://www.nasig.org)

"Established in 1985, NASIG (formerly the North American Serials Interest Group, Inc.) is an independent organization that promotes communication, information, and continuing education about serials, electronic resources, and the broader issues of scholarly communication. NASIG welcomes anyone interested in the information chain." The annual meeting is focused on issues related to serials and e-resources. NASIG is very involved in developing new NISO standards related to information delivery and access.

Society for Scholarly Publishing (https://www.sspnet.org)

"The Society for Scholarly Publishing (SSP), founded in 1978, is a nonprofit organization formed to promote and advance communication among all sectors of the scholarly publication community through networking, information dissemination, and facilitation of new developments in the field."

State and Regional Conferences

There are many other state and regional conferences that may be available to you. Joining your state health sciences libraries association or regional MLA chapter is a great way to find out about opportunities to get more involved. The best resources to find information and announcements about these conferences are the email lists below – in particular LIBLICENSE and ER&L. Your local MLA chapter may be another good resource.

Email Lists

This is not an exhaustive list of all the potentially relevant collection development email lists. These are a few of the core email lists that collection development librarians engage with.

Name	Description	Membership required?
MLA-CDC	Email list for the Collection Development Caucus (formerly Collection Development Section) of MLA. Focuses on collection issues in health sciences and medical libraries. Good place to get information on products specific to health sciences libraries.	Yes, must be a member of MLA and Collection Development Caucus
MLA-TS	Email list for the Technical Services Caucus. The Technical Services Caucus provides its members with opportunities for education, recognition, and the exchange of information, and provides leadership and research on technical services issues.	Yes, must be a member of MLA and Technical Services Caucus.
ER&L (ERIL)	Members are from all types of libraries. Good resource for help with e-resource management issues, access problems, licensing questions, and more. Also provides information about the annual ER&L conference.	No
LIBLICENSE	Focused on e-resource licensing issues and scholarly communications. Open access is a frequent topic. Good place to get help with licensing questions. This email list includes people from all types of libraries all over the world.	No
Core	Core: Leadership, Infrastructure, Futures is the national association that advances the profession of librarians and information providers in central roles of leadership and management, metadata and collections, and technology. The group known as ALCTS (Association for Library Collections & Technical Services) was integrated with Core.	Yes, must be a member of ALA and Core.

Additional Service Opportunities

Doody's Core Titles: Librarian Selector
"For each specialty, up to three librarian selectors have the responsibility of adding titles to the selections of the Content Specialists, scoring all the titles according to five basic collection development criteria, and selecting titles they consider Essential Purchase titles for small libraries." A call for volunteers is released annually. Fill out their interest form to learn more.

Publications

The following resources are helpful for keeping up to date with the trends, research, and discussions happening in health sciences collection development:

- Against the Grain

- The Charleston Advisor
- Journal of the Medical Library Association (JMLA)
- Journal of Electronic Resources in Medical Libraries
- Medical Reference Services Quarterly
- Library Resources and Technical Services
- The Scholarly Kitchen

Collection Development Fundamentals Online Courses

Online courses focused on specific niches of collection development are linked in their respective sections. Most of the targeted professional development courses are from the Medical Library Association and available on the MedLibEd platform for a fee.

American Library Association: https://www.ala.org/core/continuing-education/courses

- Fundamentals of Acquisitions
- Fundamentals of Collection Development and Management
- Fundamentals of Electronic Resources Acquisitions

Library Juice Academy: https://libraryjuiceacademy.com/topic/collections/?post_type=projects Offers synchronous online and hybrid introductory courses about general collection development and collection analysis. The offerings change quarterly as new courses become available.

Medical Library Association: http://www.medlib-ed.org/

- Collection Development: Subscribing to and Renewing Electronic Resources

Glossary

Acquisition Platform

Acquisition platforms (e.g. GOBI, OASIS, Rialto, WorldShare Acquisitions) are websites created to help libraries discover print books and ebooks to acquire (including the provision of approval plans and blanket orders), compare pricing between sources, and place orders. The pricing options available through these vary depending on the aggregator or publisher. They often include publishers and titles in disciplines beyond the health sciences although some specialize in health sciences topics. In these tools, different permission levels can be set. For instance, some people may have permission to recommend titles but not place orders while others may be able to approve and submit orders.

Acquisition(s)

An item or collection that has been purchased, rented, or subscribed to by an institution. It can also refer to a department or unit within a library that acquires items (e.g., purchase, rent, subscribe) for the library.

Agent/Jobber

A subscription agent, or jobber, is an external organization that assists libraries in acquiring content as an intermediary. The services they provide may include: collecting and summarizing publisher information for the library, negotiating with vendors and booksellers on behalf of the library, or collecting payments from the library on behalf of the vendor or bookseller.

Aggregator

An aggregator is a vendor that provides content from different sources/publishers in one interface. When you place orders through an aggregator, you can purchase items from a mix of publishers. Some examples of aggregator ebook platforms include EBSCO eBooks and ProQuest's Ebook Central

Approval plan

When a publisher or vendor creates a profile to send notifications, ebooks, or shelf-ready print books to a library this is called an approval plan. Common parameters for an approval plan profile include format, call number range, which publisher(s) to include or exclude, and audience. Typically approval plans are sent weekly or monthly and can free up time to focus on a narrower slice of title-by-title selection.

Article Processing Charge (APC)

A fee to publish in an open access journal. This fee may be assessed to the author, funder, or grant. It varies widely between journals and there may be waivers depending on a specific authorial status or location. Many libraries are entering into agreements to waive these fees in "read-and-publish" or "publish-and-read" transformative agreements.

Augmented Reality (AR)

The combination of real world experiences with a computer generated one to create a hybrid environment. This is often in the form of a computer-generated image overlaying the real world through the use of a smartphone camera or AR glasses.

Backfile

Permanent electronic access to past journal issues. These can be purchased for an individual journal or in a package for archival access to many journals. Backfiles are sometimes called a journal archive.

Backlist

A backlist is a list of a publisher or vendor's older ebooks. These are often sold as a package for a one-time fee with perpetual access.

Bibliometrics

Bibliometrics are the statistical analyses of articles, books, and other published works. Usually used to demonstrate research impact, these statistics include citation count and author networks.

Big Data

Extremely large and complex data sets, both structured and unstructured, that are so large that they require additional computing power, servers, and perhaps specialized software.

Big Deal

A Big Deal is a large journal subscription package that includes titles predetermined by a vendor. It is an alternative to purchasing journals on a title-by-title basis and can provide access to more content for less money than purchasing each journal individually.

Brandon/Hill Lists

These are subject-specific lists of core textbooks in allied health, clinical medicine, and nursing, first published in the 1960s. The lists were discontinued in 2004, but many of the works in them remain the gold standard texts in their disciplines. Current lists of texts, such as Doody's Core Titles, have their basis in the Brandon/Hill lists (sometimes referred to as Brandon-Hill or BH Lists).

Capital budget

The part of a budget that generally covers fixed assets such as property and equipment. It is meant to be used for new asset purchases and item improvements and replacements.

Citation management tools

Citation management tools are used to organize references digitally. They commonly have plug-ins to auto-format bibliographies in word processing programs. Examples of citation management programs include Endnote, Mendeley, Papers, and Zotero.

CLOCKSS

"[A] collaboration of the world's leading academic publishers and research libraries, CLOCKSS (www.clockss.org) provides a sustainable dark archive to ensure the long-term survival of Web-based scholarly content. Digital content is stored in the CLOCKSS archive with no user access unless a 'trigger' event occurs. The LOCKSS technology regularly checks the validity of the stored data and preserves it for the long term." From the CLOCKSS FAQ. A trigger event is when a journal ceases publication.

Collection development (or management)

The process by which a library creates a collection of resources for its users. May involve both local resources and those provided by affiliated groups.

Comprehensive license

A single, comprehensive license agreement lays out all of the standard license terms and elements for content from that company. Instead of having multiple licenses for individual products, a comprehensive license covers the terms for all subscription and purchased products from that company. Amendments may be added to comprehensive licenses. (Formerly called a "master" license.)

Concurrent user access

Refers to the number of users who can access a resource at the same time. Also known as simultaneous access.

Consortium

(Plural: consortia) A formal group of two or more libraries. Library consortia often have formal agreements about the specific libraries included and any expected goods or services they will provide to the other libraries in the group.

Controlled Digital Lending (CDL)

The process by which a library digitizes a print book to create a digital version. To conform to accepted copyright law, the individual print book must be removed from circulation, and the digital surrogate – which cannot be downloaded, printed, or shared – may only be made available to one user at a time.

CONTU

CONTU refers to guidelines from the Commission on New Technological Uses of Copyrighted Works that calls for libraries to pay copyright fees after they exceed borrowing 5 articles published within the last 5 years from the same journal. This is called the "Rule of 5" or CONTU limits.

Cost-per-use (CPU)

One type of analysis that can be used to determine whether a resource has value to an organization or institution. This is usually calculated by looking at user content access (i.e., usage) for a subscription period and dividing it by the total subscription cost. Libraries will have specific thresholds they see as adequate to continue to subscribe to a resource. This is determined at a local level.

COUNTER

A non-profit organization that provides the Code of Practice that enables publishers and vendors to report standardized usage of their electronic resources.

Data sets

A collection of data. These will vary in formatting, structure, size, and content. Access and rights of reproduction and sharing are determined by the creator and sometimes the publisher of the data set.

Digital rights management

Digital rights management (DRM) is the restrictions applied to an individual or group of electronic resources. In practice, DRM often equates to a limit or complete restriction on printing, annotating, downloading, and saving electronic materials.

Discovery layer/federated search interface

A search overlay on your integrated library system that displays not only the items that you buy, purchase, or subscribe to, but also integrates article-level metadata from indexing and abstracting databases.

Document delivery

A library service where non-returnable digital or physical copies of library owned materials are provided to an institution's library patrons. This usually refers to scanning and emailing a print book chapter or journal article to members of that institution.

Embargo periods

A period during which a work (e.g., journal article) cannot be openly shared outside of its original place of publication. In practice, this usually references a period of 6-12 months where a full-text journal article is usually only available behind a paywall.

Endowment

Money donated to an organization that has been invested to support a particular purpose. Most endowments keep the principal (i.e., original) funds untouched, and only allow the organization to spend the income (i.e., money in excess of the original amount). The use of these funds may have donor-imposed restrictions, such as only being allowed to purchase books about cancer.

Ephemera

"Things that exist or are used or enjoyed for only a short time; items of collectable memorabilia, typically written or printed ones, that were originally expected to have only short-term usefulness or popularity." From the Oxford Reference. Examples of ephemera include pamphlets, leaflets, notes, drawings, postcards and letters, and posters.

FERPA

"The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education." From the US Department of Education.

Finding aid

"Finding aids are tools that help a user find information in a specific record group, collection, or series of archival materials." From the National Archives.

Firm order

A type of order where materials are purchased with one-time funds. Individually ordered print books, ebooks, physical media, and streaming video are the types of resources most commonly placed through firm orders.

Frontlist

A frontlist is a list of a vendor or bookseller's most recent titles. Frontlists often consist of the titles published in the upcoming calendar year. Usually purchased as a firm order.

HIPAA

"The Health Insurance Portability and Accountability Act of 1996 (HIPAA) is a federal law that required the creation of national standards to protect sensitive patient health information from being disclosed without the patient's consent or knowledge." From the Centers for Disease Control.

Holdings

Holdings is a broad term that encompasses all the resources that your library purchases, subscribes to, or leases. It is inclusive of print and electronic resources and all formats.

Indemnity clause

A clause that states that one party must compensate the other for losses. In libraries this is often used to try and require libraries to pay vendors or publishers for real or perceived losses due to unauthorized access or duplication of materials. Most libraries and institutions will not agree to this liability-shifting clause.

Indexing and abstracting database

A database that indexes individual journals and their articles. It may include only abstracts and point users to the full text using various authentication schema, or it may include some full-text articles in addition to the abstracts.

Institutional Repository (IR)

A digital platform where members of an institution may deposit their scholarly works. Commonly deposited works include electronic theses, posters, oral presentation slides, and article pre-prints.

Integrated Library System (ILS)

The system or software package used by libraries to manage and centralize acquisitions, cataloging, circulation, patron searching, and other library functions.

Interlibrary Loan (ILL)

A library service where copies of parts of works or whole works are sent physically or electronically to other libraries to loan to their patrons. Physical copies must be returned to the lender and digital copies may have digital rights management applied to restrict access.

Liaison librarian

A librarian designated as the formal library contact with a department, college, or other academic unit. Liaisons may have collection development responsibilities.

License amendment

Also referred to as a license addendum (Plural: addenda). This is an amendment to the original contract that adds or revises its terms and rights. For libraries, this is used often to expand permitted uses, specify accessibility remediation needs, and identify additional user classes.

LOCKSS

Lots of Copies Keep Stuff Safe. "With LOCKSS technology, content is served from a library's LOCKSS box to an institution's own readers when the publisher's site is unavailable. LOCKSS networks provide 100% continual and post-cancellation access to that institution's campus community." From the CLOCKSS FAQ.

MARC records

A MAchine-Readable Cataloging record. This type of metadata is the basis of most Online Public Access Catalogs (OPACs). They can be locally created or downloaded in batches from vendors. Good quality, descriptive MARC records are the foundation of resource discoverability.

Memorandum of Understanding (MoU)

A document that defines the parameters of a deal between two or more parties. It will specify the parties involved, a time-bound contract length, and specify what goods or services will be performed or offered by either party. Unlike a contract, however, MoUs are typically not legally binding.

Monograph

Books and ebooks are also called monographs. These are completed works that might be updated in a few years with a new edition, but unlike journals, their contents are not regularly updated on a frequent basis.

Monographic series

Collection of monographs published over time that cover the same broad topic. Each book in a monographic series is a completed work. For example, the Handbook of Clinical Neurology series publishes about eight monographs a year, with titles covering narrower topics such as Aphasia, Disorders of Emotion in Neurologic Disease, and The Temporal Lobe. This is different from a multipart monograph, which is a work that is completed within a certain number of parts, such as volumes 1 and 2 of Harrison's Principles of Internal Medicine.

One-time package

A one-time package is a collection of titles for which the library pays a single fee to own the content. Access is usually granted in perpetuity, unlike a subscription package. The library will continue to have access to all of the titles in that collection and will not incur an ongoing fee to access the content, although some vendors charge an annual maintenance fee to cover the costs of maintaining the online hosting platform. Updates to content from one-time packages are often available for an additional cost.

OPAC

An online public access catalog (OPAC) is the online interface for accessing a library's collection, both physical and digital. An OPAC is often simply referred to as a "catalog."

Open Access (OA)

From the Bethesda Statement, open access is the "free, irrevocable, worldwide, perpetual right of access to, and a license to copy, use, distribute, transmit, and display the work publicly and to make and distribute derivative works, in any digital medium for any responsible purpose, subject to proper attribution of authorship" and from which every article is "deposited immediately upon initial publication in at least one online repository."

Open Educational Resource (OER)

Teaching, learning, and research resources available through the public domain that can be freely used or modified by others.

Operations budget

The operations budget covers the expenses needed to run a library, such as the personnel, technology, maintenance, and utility fees. This is separate from a capital budget.

Patron-Driven Acquisition (PDA) or Demand Driven Acquisition (DDA)

These terms refer to programs where a library loads ebook records from an aggregator into their catalog, and then when a title is used a certain number of times, it is either automatically purchased or sent to a selector for review. This is one method of providing point-of-need access to resources that also reduces the purchase of titles that are rarely or never used by patrons.

Permalink

Also called a permanent, durable, or stable link, a permalink is an unchanging URL that is intended to always redirect to a particular resource. In cases where a resource's URL changes, the permalink URL will not change but will be updated to redirect to the new URL.

Perpetual access

A contractual agreement that grants an institution continued access to an online resource in perpetuity, with some potential exceptions (e.g., if a company is acquired). In some cases an institution may have subscription access to a resource with perpetual access to select content even if the subscription expires or is canceled. For example, if a library subscribes to a journal from 2015-2019, they may only have perpetual access to 2015-2019 content, even if they had access to additional years during their subscription period.

Point-of-care and diagnostic tools

Point-of-care and diagnostic tools (e.g., BMJ Best Practice, Dynamed, Essential Evidence Plus, UpToDate) are reference/information tools that offer clinicians bedside access to diagnostic and treatment options.

Predatory publishing

According to Think. Check. Submit., "Predatory publishers or journals are those which charge authors a fee for publication with no intention of providing the expected services – such as editorial or peer review – in return. Charging a fee is a legitimate business model, but the publisher should be providing a good publishing service in return. Authors, realizing that they have submitted their paper to a questionable publisher, can find they are charged a large fee if they want to withdraw their article."

Preprints

Preprints are scholarly manuscripts that have not yet been formally peer reviewed or published by a journal. They are deposited on preprint servers (e.g., medRxiv), some of which allow others to discuss and comment on their contents. Preprints offer a way to view new research results quickly, but because they have not yet undergone the peer review process, they may contain errors or omissions.

Print retention program

In print retention programs, member libraries agree to retain selected titles in perpetuity (or for a specified time frame) at their individual locations (either on-site or off-site), allowing other member libraries to withdraw duplicate copies as needed.

Print-on-demand

Some vendors sell print copies of their digital content on demand. Libraries may use print-on-demand to supplement normal interlibrary loan borrowing. Instead of borrowing the content from another library, the library simply purchases a print copy of the specific article, chapter, or book that was requested.

Proxy access

The use of a proxy server to access electronic resources. Proxy servers allow users to authenticate their access using single sign-on. They are then routed to the product through their institution's IP addresses, which are recognized by product vendors as being part of a subscribing institution.

Reciprocal borrowing

Programs where partnering institutions agree to extend in-person borrowing privileges to their users. Usually reciprocal borrowing privileges are leveraged between institutions in a localized region.

Selector

The librarian who purchases, rents, or subscribes to resources for a specific subject area(s).

Serials (or periodicals)

Serials are works that are intended to be published indefinitely. Serial publications get updated regularly and relatively frequently (e.g., weekly, monthly, quarterly). Some examples of serials include journals, magazines, newspapers, trade publications, and yearbooks.

Shared print repository

A print collection housed in a centralized facility that is shared among and maintained by member libraries. Having a shared print repository allows member libraries to weed individual copies of duplicate titles.

Single sign-on (SSO)

A method of user authentication that employs one username and password for institutional applications and resources. Examples of SSO systems commonly used in libraries are OpenAthens and Shibboleth.

Slips

Commonly used in approval plans, a slip originated as a piece of paper with information about a specific book title (e.g., bibliographic information such as title, author, publication date, edition, and ISBN; Library of Congress call number; and pricing) that allowed librarians to make purchasing decisions on titles without having the books physically shipped to them. Many approval plans now send libraries digital "slips" (i.e., notifications) so that librarians can make a decision on whether to purchase those book or ebook titles.

Standing order

A list of titles that are automatically ordered when available -- which may be several times a year, once a year, or every few years. It can refer to monographs, serial monographs, or journals, and uses funds annually. Items are paid upon receipt. This is in contrast to firm orders.

Subscription

A subscription is an ongoing rental of content. This is usually on an annual basis, although the time frame is negotiable. Subscription costs often increase over time. Titles that are part of a subscription package can also change. This happens more often with aggregator-based subscriptions as publishers may pull their content from aggregators with little or no warning.

Subscription or "toll-access" journal

A journal that requires an individual or institutional subscription to access its contents. Publishing in these journals is free of charge for authors, although some journals may charge a fee for color figures.

SUSHI

Standardized Usage Statistics Harvesting Initiative (SUSHI) is a NISO standard/protocol that automates the retrieval of COUNTER usage reports for electronic resources to local systems (e.g., Alma). See the COUNTER SUSHI website for more information.

Systematic review production tools

These tools allow users to upload citations, screen abstracts, and extract data for systematic reviews through a cloud-based program. Popular systematic review production tools include Covidence, DistillerSR, and Rayyan.

Transformative agreement

A contract that incorporates a shift from subscription-based reading towards open access publishing. Two common types of transformative agreements are “Read-and-Publish” and “Publish-and-Read” agreements. In “read-and-publish” agreements, the publisher is paid for both reading subscription content and publishing open access, while in “publish-and-read” agreements, payment is for publishing and reading subscription content is free.

Virtual Reality (VR)

An interactive, immersive, computer-generated 3D environment that usually employs devices such as headsets and motion controllers.

VPAT

Voluntary Product Accessibility Template (VPAT) is a form that a vendor fills out that specifies how a product meets the IT accessibility standards of the federal section 508 standards. See the VPAT website for more details.

Weeding

Weeding is also referred to as deaccessioning or deselection. It refers to both the process of evaluating items that can be withdrawn from the collection, as well as the physical act of removing those items. Physical items (e.g., multimedia, print books, A/V equipment) and electronic items (e.g., ebooks) can be weeded from library collections.

Versioning History & Topic Suggestions for Future Updates

Versioning History

This table lists major changes to this work. Minor content and formatting updates are expected to occur continuously but will not be tracked in this table.

Version	Date	Change
2.05	08/19/2024	Added a new chapter on "Getting Started," and added a new section on how to "Share Feedback through the Hypothesis Sidebar."
2.04	07/23/2024	Updated several MLA links following MLA's transition to a new website.
2.03	04/15/2024	Renamed "Assessment" chapter to "Evaluating Resources: Deciding What to Buy, Keep, Weed, or Cancel".
2.02	09/22/2023	Added a section on streaming media acquisitions, updated glossary terms, and removed broken links.
2.01	07/26/2023	Added sample challenged materials policies and updated a few links.
2.00	01/03/2023	Completed work is officially published.

Topic Suggestions for Future Updates

Please suggest any updates to the 2nd edition or topics you would like to see added to the 3rd edition to gaukh@vcu.edu and iriskg@msu.edu.

- More details about how to look at COUNTER reports. Which are the most common COUNTER reports we use?
- Reliability of SUSHI reports.
- Transformative agreements, read and publish, subscribe to open.
- Link to *Contemporary Issues in Collection Management*?
- Include a government/federal library perspective.