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2020–2021 ANNUAL REPORT OF ACTIVITIES AND PROJECTS

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

Members

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

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

CARLI Staff Liaisons: Elizabeth Clarage, Jen Masciadrelli

Meetings

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

Review of Committee and CARLI Committee Structure

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

Subcommittees

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

Update to Open Access Collection Criteria

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

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

Weeding eBooks

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

Collection Development Directory

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

Informal Chats

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

Brief Summary of Informal Chat Sessions

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

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

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

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

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

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

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

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

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

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

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

Weeding Ebooks - Recommendations

CARLI Collection Management Committee, May 2021

INTRODUCTION

Why weed ebooks? On first thought, it seems unnecessary: ebooks never get worn, damaged, or lost, and they don't take up expensive physical space. Weeding ebooks may not be on the mental to-do lists of many librarians. Most ebooks are recent publications that have not had the time to become outdated; and ebooks often evade our attention as they sit in a virtual space only coming forward when we search in our discovery tools or go looking for them.

But all library sources, regardless of format, may eventually become outdated or superseded. As electronic forms of library sources become prevalent in our collections, they must receive the same attention that is given to physical collections. Providing our users with outdated information simply because of inattention is a lost opportunity for learning, not to mention a violation of Ranganathan's Fourth Law "Save the time of the reader."

Several standard resources and guides for weeding and management of library collections are freely available: **MUSTIE** (Misleading/Ugly/Superseded/Trivial/Irrelevant/easily found Elsewhere) is from the CREW Weeding Manual although since Ugly is not relevant to ebooks, **MISTIE** would perhaps be more accurate. The **CRAAP** test (Currency, Relevance, Authority, Accuracy, Purpose), even though it is usually discussed in the context of information literacy programs, can serve equally well as a guide to weeding.

The actual procedures for identifying and withdrawing ebooks present some challenges that are not found when weeding physical book collections. Like other electronic collections, usage data is collected directly from vendors, and these data may or may not be compliant with standard data gathering schemes, for example, COUNTER. Due to the varying, or even capricious, licensing agreements that govern access to our ebooks, it may not be possible to delete all traces of withdrawn ebooks. Instead, they may live on in our systems and catalogs, still there but suppressed from public view. If ebook titles are purchased in packages and not individually cataloged but accessed via the turning on of catalog record collections in knowledge bases, then we may have very little control over whether an individual title can even be withdrawn or suppressed.

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

This document is not a procedural manual. It is not a step-by-step guide on how to undertake a review of materials or remove the electronic footprint from your library management systems. Rather, this document provides the elements that should be considered when reviewing ebook collections. Much of the information provided is from a review of recent literature on the topic.

AUDIENCE

The CARLI Collection Management Committee prepared this document with the intended audience to be librarians and staff at member institutions.

BRIEF LITERATURE REVIEW

CREW Manual (2012 version) is a useful work. Although it is written primarily with small- to medium-sized public libraries in mind, all types of libraries can benefit from a study of this publication. **CREW** (Continuous Review, Evaluation and Weeding) places deselection within the broader context of library practice, and it always keeps in mind the needs of an individual library's community of users. The CREW model integrates deselection into the entire acquisitions-cataloging-circulation/reference cycle, and makes weeding/deselection the last step in the cycle. **MUSTIE** (Misleading/Ugly/Superseded/Trivial/Irrelevant/easily found Elsewhere) (or **MiSTIE** - without the Ugly component) is a helpful acronym for the factors to consider when reviewing a title for retention.

Crosetto (2012) and Cully (2015) are recommended as good overviews of the issues relating to weeding ebooks. For both authors, currency of information is the primary factor to consider when deciding to retain an e-publication or not.

Waugh et al. (2015) present an intriguing case study in deselecting ebook collections. They describe a project to evaluate a collection of NetLibrary titles from the early 2000s; in the process, they outline the problems of early ebook publications: outdated medical titles, the hazards of "link rot" in many aging titles, and trying to deselect some titles but not all of them in a collection. This publication will be of interest to those CARLI libraries that purchased similar titles from NetLibrary and may want to begin the process of weeding them.

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

WEEDING RECOMMENDATIONS

- Reasons to weed e-books:
 - Content no longer relevant / retention policy
 - "Criteria for weeding e-books should be similar to those that should already be in place for print resources. While the physical condition is not an issue, the content is still applicable. Libraries should evaluate if patron needs have changed, and if some subject area use has decreased." (p. 4) - Culley

- “E-books should be treated in the same way as physical collections, with guidelines for retention based on use, accuracy of information, and relevance to the patron” (p. 26) - Moroni
- Low usage
 - “Physical items that have low use or do not circulate occupy space. Although an unused e-book is not taking up valuable real estate space on the shelves, it does occupy space in the online catalog.” (p. 86) Crosetto
 - “Circulation counts are viable, as are annualized turnover statistics, particularly if you already use those measures for your physical collections.” (p. 26-7) - Moroni
- Content outdated
 - “The more important of the traditional reasons for weeding is currency of content. Outdated resources occupy valuable space on the shelf and in the catalog.” (p. 86) - Crosetto
 - “...it is inadvisable to keep large amounts of outdated and inaccurate materials that could be damaging to the integrity of researchers’ work.” (p. 4) - Culley
- Content superseded by a new edition
 - Reference titles are a priority for weeding, whether in print or electronic form. “This is most evident with reference titles. Resources traditionally identified as reference items typically have higher costs, may contain multiple volumes, and are regularly updated, often annually. Some reference titles remained on shelves indefinitely, while others—once superseded by newer editions—were typically regulated to circulating collections, remote storage, or discarded. The same criteria used for weeding physical reference titles should be applied to reference e-books.” (p. 86) - Crosetto
- Clutters catalog
 - “Physical items that have low use or do not circulate occupy space. Although an unused e-book is not taking up valuable real estate space on the shelves, it does occupy space in the online catalog.” (p. 86) - Crosetto
 - “The more important of the traditional reasons for weeding is currency of content. Outdated resources occupy valuable space on the shelf and in the catalog.” (p. 86) - Crosetto
- Duplicate content

- “...removing e-books from the DDA program that are duplicated in any subscriptions would save libraries from unnecessary purchases.” (p. 4) Culley
- “Including all formats in the consideration of the collection, rather than separately, can present a better picture of the completeness of the collection. You do not need to retain all titles on a topic or by an author in all formats, but should consider maintaining a complete backlist or subject coverage combined across formats” (p. 26) - Moroni
- Who should be involved/consulted in the weeding process?
 - “Should the requestor type be a factor in the weeding of items? And if the requestor is a factor, requestor types themselves need to be prioritized...should the requestor be as important as the number of circulations?” (p. 87) - Crosetto
 - “...the most important way for librarians to build and strengthen the lines of collaboration is to involve all interested individuals in the evaluation process and potential withdrawing of titles. K–12 teachers, academic instructors, and researchers, who are asked to submit requests for purchasing titles, should also be included in the removal of titles.” (p. 87) - Crosetto
- Miscellaneous
 - Libraries may already have a weeding policy that can easily be applied to their e-book collection. (p. 26-28) - Moroni

CHALLENGES

- “However, due to the access configuration of shared titles in EBSCO’s e-book platform, participants cannot suppress, remove, or “turn off” e-books they share with others, even via their own vendor portals. With the CCLC [California’s Community College Library Consortium] shared collection, it’s an all or nothing situation, where title removals affect all license holders. One option for libraries no longer wishing to provide access to specific titles is to remove catalog records from their ILS, reducing the chance that a given title would be found. Still, the title remains “discoverable” by patrons in other ways, including through EBSCO eBook Collection portals.” (Weintraub)
- Remember that even when a title is removed, it may still be licensed under your contractual agreement with the vendor/publisher. (p. 27) - Moroni

- “When the first shared collection was offered, the long-term consequences of this configuration, as well as e-book search and retrieval behaviors of patrons, were not fully understood by participating libraries. (Weintraub)”
- “...equally important element of the weeding process of e-books: the purchasing model. The librarians need to know where the e-book resides, which then regulates how the e-book is weeded.” (p. 87) - Crosetto
- Relying solely on the ILS to evaluate collection contents and usage statistics will result in incomplete information, especially if you use external/non-integrated ebook platforms. (p. 27) - Moroni

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CARLI Commercial Products Committee FY 2021 Annual Report of Activities and Projects

Members

Amanda Wiesenhofer	2017–2021	Lincoln Land Community College, Chair
Jessica Harris	2020–2021	University of Chicago
Edith List	2020–2021	Principia College
Marie Martino	2019–2022	Moraine Valley Community College
Will Midgley	2018–2021	University of Illinois at Chicago
Jim Millhorn	2020–2021	Northern Illinois University
Thane Montaner	2018–2021	Prairie State College
Kavita Mundle	2017–2021	University of Illinois at Chicago
Megan Ruenz	2019–2022	Wheaton College

CARLI Board Liaison: Frances Whaley, Kishwaukee College

CARLI Staff Liaisons: Jennifer Taylor, Nicole Ream-Sotomayor

Activity Highlights

Electronic Resource Proposals

The CPC received one product proposal in FY21. After review by the committee, the proposal was rejected.

Review of Committee Charge and Structure

The bulk of the committee's work in FY21 dealt with the charge from the CARLI Board to evaluate the committee's charge and its place within CARLI's committee structure. The committee determined that it should retain its current charge into the future. It also identified two distinct areas where additional CARLI committees could be able to meet recent and emerging needs of member institutions: e-resources troubleshooting and discovery. The group also suggested the formation of a working group focused on Alma Analytics. The need for groups dedicated to e-resources and discovery were also suggested by other CARLI committees, leading the Board to charge an E-Resources Management Task Force and a Discovery Task Force. Moving forward, the committee will facilitate open communication with the E-Resources Management Task Force through a liaison between the two groups.

CARLI Created Content Committee: FY 2021 Annual Report of Activities and Projects

Members

Hunt Dunlap	2018–2021	Western Illinois University
Marlee Graser	2017–2021	Southern Illinois University Edwardsville
Tricia Lampron	2017–2021	University of Illinois at Urbana-Champaign
Greer Martin	2017–2021	Loyola University Chicago, co-chair
Matthew Short	2016–2021	Northern Illinois University
Angela Yon	2018–2021	Illinois State University, co-chair

CARLI Board Liaison: John Pollitz, Southern Illinois University Carbondale

CARLI Staff Liaisons: Amy Maroso, Elizabeth Clarage

Introduction

The Created Content Committee met monthly on one hour Zoom conference calls and communicated through its email list. The one day in-person meeting during the year typically held in the past was not possible due to the COVID-19 pandemic. Additionally, co-chairs attended two CARLI (July 17, 2020 and January 12, 2021) all committee meetings and reported to the group. In 2020, CARLI suspended calls for FY21 committee volunteers to allow each committee to have time to focus on the evaluation of CARLI's current committee structure.

Re-evaluation Report

FY21 was a year of transition for CARLI due to the migration to Alma/Primo VE and circumstances surrounding COVID-19. The Board directed all CARLI committees to assess their group's work and discuss if it should continue, cease, combine with another committee, or split into additional committees. The Created Content Committee evaluated the group's charge and work, and submitted a re-envisioning report with the recommendation to continue with the current charge, focusing on areas most helpful to membership within the current committee structure.

Workshop

Workshop: Messy Data? Clean it up with OpenRefine! - Presented via Zoom in two separate sessions:

- The Basics of OpenRefine by committee member Tricia Lampron, University of Illinois Urbana-Champaign, on February 9, 2021
- Using OpenRefine to Reconcile Your Data by committee member Greer Martin, Loyola University Chicago, on February 17, 2021

The Committee had planned a one-day, in-person OpenRefine workshop in FY20. In March 2020, after the suspension of in-person meetings and programming, this workshop was postponed and was planned for Fall 2020. Since in-person meetings were still unable to be held, the committee elected to break the information into two webinar sessions and present them via Zoom in FY21.

OpenRefine (<https://openrefine.org/>) is a free, open source tool used to organize, clean up, and transform data. The workshops included an overview of the browser based application, as well as use cases that show the benefits of working with your local data in OpenRefine. The first session demonstrated the basic functions to get started on cleaning up data, while activities in the second session explained reconciling data against two different types of sources: library authority data and Wikidata. The workshop also taught how to import data by making an API call in OpenRefine, and how to export your data in different formats such as XML and JSON.

The sessions were very well attended with an engaged audience that followed along and worked through scenarios with the presenters during each live session. “Messy Data? Clean it up with OpenRefine! Webinar 1: The Basics of OpenRefine” (February 9), 45 individuals participated, including a number of additional CARLI staff.

The follow-up session devoted to advanced functions, “Messy Data? Clean it up with OpenRefine! Webinar 2: Using OpenRefine to Reconcile Your Data,” (February 17), had 38 individuals participate.

Due to the ongoing software updates to OpenRefine, the recordings of these sessions, which provided some step-by-step instruction are only available online through June 2021.

PrimoVE External Source Integration Documentation Project and Continued Project

The Committee created documentation to support discovery of external sources in Primo VE. External sources are materials such as digital collections hosted via other software like CONTENTdm or Islandora. Setting up external sources in Primo VE allows end users the opportunity to access resources from other systems via their local Primo VE catalog. The project details the main concepts and general workflow for loading external data sources into Primo VE, including: the Discovery Import Profile, the Normalization Process Task, Normalization Rules, and Resource Types. It provides a compilation of relevant ExLibris Alma/PrimoVE instruction links.

The project also includes a Normalization Rules document with a series of example stanzas and individual User Stories (CONTENTdm, Digital Commons, IDEALS Dspace, and Islandora) from committee members. When complete in June 2021, these resources will be shared on the CARLI website.

On-Going Tasks

The committee continued producing quarterly Keyword and Traffic Reports through Google Analytics data from CARLI Digital Collections. These reports provide members with the available usage data for CARLI Digital Collections. They are available on the CARLI website at:

<https://www.carli.illinois.edu/products-services/contentdm/google-analytics-usage-reports-carli-digital-collections>.

CARLI Instruction Committee

FY 2021 Annual Report of Activities and Projects

Members

Kristin Allen	2019–2022	Harper College
Anne Armstrong	2018–2021	University of Illinois at Chicago
Joshua Avery	2019–2021	Wheaton College
Amy Hall	2017–2021	National Louis University
Tish Hayes	2019–2022	Moraine Valley Community College
Molly Mansfield	2017–2021	Dominican University
Christina Norton	2018–2021	Bradley University, Co-Chair
Dee Anna Phares	2019–2022	Northern Illinois University, Co-Chair

CARLI Board Liaison: Rebecca Donald, Trinity International University

CARLI Staff Liaisons: Debbie Campbell and Denise Green

Charge

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

Meetings

Because of the COVID-19 pandemic, all meetings were held by video conference and took place on the third Wednesday of the month from 1:00–2:30 p.m. The committee also used the instruction@carli.illinois.edu mailing list and a Google Drive folder to share information and documents outside of meeting times.

Theme

The committee’s theme this year was **Virtual Realities: The Challenges and Potential of Online Instruction**. Last year’s emphasis on embracing change and moving “beyond your comfort zone,” was amplified and expanded this year, since those who provide information literacy instruction faced new “Virtual Realities” that required many to change their praxis, and sometimes even their pedagogy, to adapt to the needs of patrons, faculty partners, and their institutions. And while this highly mutable period posed challenges for those required to (sometimes repeatedly) pivot and adjust, it also presented an occasion for reflection and reimagining--both in terms of the practical delivery of instruction and the larger issues associated with access to information and information instruction. For that reason, our

programming and projects were aimed at providing librarians a space to both share innovative tools and strategies and to discuss challenges they faced delivering quality instruction to patrons who were facing their own myriad challenges. In addition, our activities emphasized the potential for positive change in this highly fluid period, especially in regard to bolstering anti-racist efforts, and promoting diversity, equity, inclusion, and accessibility in library instruction. The webinars, discussions, and showcase afforded members of the CARLI community occasions for collegiality, encouragement, and a chance to develop new “best practices” even in some of the worst times.

Online Accessibility/Inclusion Discussion

The committee hosted two online discussions focused on issues related to online instruction. The first, held on November 06, 2020, focused on issues of accessibility and inclusion that arose during teaching online, especially related to librarian’s experiences during the COVID-19 epidemic. The approximately 83 registrants shared both challenges and opportunities related to the online environment. A recording of the session, as well as a list of tools and strategies compiled based on the discussion, was posted on the CARLI website here: <https://www.carli.illinois.edu/carli-instruction-committee-online-accessibility/inclusion-discussion>.

Primo VE in Practice: Life after Going Live

During 2019-2020, the Instruction Committee collaborated with the Public Services Committee on a joint subcommittee devoted to “Creating Use Guides and Tutorials,” in preparation for the consortium’s transition to Alma/Primo VE in June 2020. That effort culminated in the creation of [resources](#) for CARLI libraries, and a presentation delivered at the virtual event on April 2, 2020, called “Getting Ready for Primo VE.” An attendee of that webinar contacted the committee about the possibility of a follow-up event that would allow CARLI members to share best practices for teaching Primo VE six months after the transition. That webinar, “Primo VE in Practice: Life after Going Live,” took place on December 2, 2020 from 1:00–2:30PM, and featured six 10-15 minute presentations focused on the presenters practical experiences instructing patrons on how to use Primo VE whether at a reference desk, in a classroom, or in another setting. 155 people registered for the webinar hosted on Zoom, and between 75–80 people attended on the day. Not only was the event incredibly useful to librarians and library staff across CARLI, but it has also become a valuable resource for other libraries making the move to Alma/Primo VE, such as the members of a team working on the University of California's Systemwide Integrated Library System consortium project who reached out to the Instruction Committee as a result of our sharing of the recording.

The recording of the webinar and links to the presenter’s resources are available here: <https://www.carli.illinois.edu/products-services/pub-serv/instruction/LifeAfterGoingLive20201202>.

ACRL Framework Toolkit Revision

The Instruction Committee maintains a web page, the [ACRL Framework Toolkit](#), providing context and resources around the ACRL Framework for Information Literacy, which was released in 2015. This web page includes an extensive bibliography of publications and other resources related to the Framework, which was last reviewed in 2017. The committee completed another thorough review of the bibliography

this year, removing older citations that had become outdated and adding more recent ones that reflect developments in the professional conversation around information literacy. This maintains the relevancy of the toolkit as a resource for teaching librarians within CARLI as well as those outside the system, since the toolkit has been widely shared outside of our consortium as well.

CARLI Covid Survey

A subsection of committee members began the process of completing a survey of teaching librarians within CARLI, with the goal of gathering insights into how the COVID-19 pandemic and its associated conditions affected their library teaching experiences. The goal of this survey is to “identify the new strategies and techniques librarians have employed, to determine which adaptations were effective and will continue to be beneficial in a post-COVID instruction environment, and to ascertain what resources and supportive structures are necessary for the successful implementation of these techniques and strategies.” Additionally, the committee hopes that analysis of the survey data will help identify “emerging instructional needs that might be addressed at a consortial level.” Committee member Annie Armstrong is serving as principal investigator and a Claim of Exemption was granted to the project through the University of Illinois at Chicago IRB. The survey is open for responses as of June 2 and will remain open until August 13, at which point the committee will begin analysis.

Online Instruction Discussion

The second online instruction discussion was held on March 03, 2021, with 60–70 attendees. Based on the direction that discussion took during the first event, the topic for this second meeting was announced as being online instruction in general, to allow for participants to have their varied interests more easily addressed. Committee members compiled questions to prompt discussion, which were shared with registrants before the event, but conversation was allowed to follow where participants’ questions and answers led it. Issues covered included tools and software, assessment techniques, and emotional support for students. A summary of both discussions was written by a committee member and published as [a column in Internet Reference Services Quarterly](#).

The recording of the event is available on the CARLI website at: <https://www.carli.illinois.edu/carli-instruction-committee-online-instruction-discussion>.

Collaboration with the University of Illinois at Urbana-Champaign Library and Project Information Literacy: Virtual Chat with Barbara Fister

The Instruction Committee was approached by Merinda Hensley about co-sponsoring a Virtual Chat with Barbara Fister, author “[Lizard People in the Library](#),” along with the University of Illinois at Urbana-Champaign Library and Project Information Literacy--a nonprofit research institution. CARLI staff and the Instruction Committee organized, publicized, and provided material support for the event, and on Tuesday, May 18, 2021 from 11:00 a.m.–Noon, David Ward, Director of Teaching and Learning at the University of Illinois at Urbana-Champaign served as the moderator of a conversation that focused on a number of topics, ranging from combating misinformation, empowering students, and promoting social justice, to an exploration of how librarians and instructional faculty can engineer personal agency as a part of information literacy instruction. The registration for the event was capped at 50 at the behest of

Ms. Fister, who wished to create a more intimate atmosphere, but it was recorded to ensure that all CARLI members would be able to engage with the topics discussed. Informal feedback from attendees was extremely positive, with a majority suggesting they felt inspired to reimagine their practice through a social justice lens and to do more to centralize student knowledge and experience.

The recording of the Virtual Chat, as well as the notes and resources associated with the event are available at: <https://www.carli.illinois.edu/virtual-chat-barbara-fister-instruction-committee-event>.

Instruction Showcase

The committee held the 9th Annual Instruction Showcase via Zoom on Friday, May 21, 2021 from 9:15 a.m.–2:00 p.m., with a virtual “lunch” and discussion from noon–12:30 p.m. The event featured a keynote conversation focused on “Disability Accessibility in the World of Library Service” and seven presentations which offered novel and inventive instruction techniques, tools, and lesson plans that not only addressed the transition from in-person to online instruction, but also highlighted strategies for incorporating of technology and tactics in post-pandemic instruction--engaging fully with this year’s theme, Virtual Realities: The Challenges and Potential of Online Instruction. The keynote and presentation were provocative and stimulating, fostering lively discussion and building a foundation for conversation and collaboration amongst the presenters and attendees.

This virtual event was well-attended, with 117 registrants and approximately 80 attendees. A video of the Showcase will be made available on the CARLI website at: <https://www.carli.illinois.edu/carli-instruction-committee-9th-annual-instruction-showcase>.

Respectfully Submitted by
Christina Norton and Dee Anna Phares
Co-Chairs, 2020–2021

CARLI Open Educational Resources Committee: FY 2021 Annual Report of Activities and Projects

Members

Annette Alvarado	2020–2021	Loyola University Chicago
Anne Chernaik	2020–2021	College of Lake County
Daniel Matthews	2020–2021	Moraine Valley Community College
Elizabeth Nelson	2020–2021	McHenry County College
Michelle Oh	2020–2021	Northeastern Illinois University
Anne Shelley	2020–2021	Illinois State University
Susan Shultz	2020–2021	DePaul University, Co-Chair
Janet Swatscheno	2020–2021	University of Illinois at Chicago, Co-Chair
Chris Sweet	2020–2021	Illinois Wesleyan University

CARLI Board Liaisons: Karen Janke (2020–2021) Erikson Institute and Jacob Jeremiah (2020–2021) Oakton Community College

CARLI Staff Liaisons: Elizabeth Clarage and Nicole Swanson

Meetings

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

Charge

At the direction of the CARLI Board of Directors, the Committee reviewed its current charge and made the recommendation that specific names be removed and the language be reflective of the committee's topics and tasks so that the charge need not be updated when outside entities change their name.

Updated Charge

The Open Educational Resources Committee will support CARLI's commitment to the "Open Illinois Initiative," with participation in national organizations and use of consortial OER products and services. The Committee will promote the cooperation and collaboration of open educational resources (OERs) adoption, adaptation, creation, and peer review, and identify and develop materials about OERs for libraries' use with their institutions. This commitment includes the planning and delivery of statewide training about OERs, and the development of web resources related to Open Educational Resources.

The committee may be assigned projects by the Board of Directors or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The OER Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, inclusion, and equity (DEI), and will ensure that CARLI's commitment to diversity, equity, and inclusion is embedded in their work. The committee will identify educational and training needs within its

scope of responsibility and its collaboration with other committees, and will develop workshops, seminars, webinars, or other education opportunities to meet the needs of the membership. The committee will prepare appropriate documentation and reports and will submit an annual report of its activities and accomplishments to the Board of Directors.

Activities

Understanding and Promoting Open Educational Resources Train-the-Trainer Virtual Workshops

Prior to the COVID-19 Pandemic, the OER Committee planned to do in-person, one day train-the-trainer workshops. When the COVID-19 restrictions were put in place, the OER Committee decided to pivot to virtual training. Sue Shultz, Janet Swatscheno, and Elizabeth Clarage developed the pilot training based on the Open Education Network's openly licensed training material, along with other openly licensed material. The group decided that for a virtual course, a full day workshop was not ideal and instead opted for a 3-week course that meets synchronously for an hour and half each week along with asynchronous readings and activities. The pilot workshop was delivered in July 2020. The course was further refined based on feedback and delivered again in September 2020, December 2020, February 2021, April 2021, and June 2021. The following committee members and CARLI staff taught the workshops over the course of the committee term: Janet Swatscheno, Sue Shultz, Anne Shelley, Chris Sweet, Dan Matthews, Annette Alvarado, Michelle Oh, Anne Chernaik, Elizabeth Clarage, and Nicole Swanson. In total, 64 CARLI affiliated librarians attended the course between July 2020 and April 2021.

OER Commons Hub

In November 2020, the OER Committee formed a group to help advise on the design and implementation of the CARLI OER Commons Hub. Anne Chernaik and Dan Matthews assisted CARLI staff in the Hub design and identified resources for the curated collections. They also volunteered to advise and organize the CARLI OER Commons Hub.

Open Education Network: Certificate in OER Librarianship Program

In 2020, CARLI provided funding for five librarians from CARLI member institutions to participate in the Open Education Network's Certificate in OER Librarianship. Two Open Education Leadership participants joined the CARLI OER Committee in 2020. In 2021, CARLI provided funding for seven librarians from CARLI member institutions to participate in the certificate program.

Open Education Week

The OER Committee participated in Open Education Week in March 2021. Members of the committee wrote short descriptions of useful OER-related resources each day of Open Education Week and sent them to the CARLI OER Email List.

OER Faculty Workshop

The Committee designed and developed an OER Faculty Workshop to be offered periodically to faculty and administrators from Illinois institutions. In FY21, the workshop was held on February 24 and March

23. Many members promoted the workshop to their faculty and three member institutions offered stipends to their faculty who attended and wrote a review in the Open Textbook Library.

Registration and attendance for both workshops demonstrated a strong interest in learning more about OER from faculty across the state as reflected in the numbers below.

Outcomes from Institutions Offering Stipends

Institution #1: 32 registered; 19 attended; 11 reviews written

Institution #2: 37 registered; 18 attended; 12 reviews written

Institution #3: 2 registered; 1 attended; 0 reviews written

Twenty-one instructors from these institutions noted that they were interested in adopting an open textbook for a future course, and 20 indicated interest in authoring an open educational resource.

Outcomes from Institutions not Offering Stipends

Totals: 57 registered; 36 attended; 2 reviews written; 9 expressed interest in using an open resource in future classes; and 7 were interested in authoring an open educational resource.

OER Open Office Hours

The OER Committee launched a new professional development opportunity for CARLI members in the second half of FY21 to provide a space for informal discussions about OER. The kick-off meeting on January 27 was only offered to alumni of the CARLI OER Course: Understanding and Promoting Open Educational Resources. The January meeting informed our approach to this event going forward and the following decisions were made:

- The meeting will be open to any CARLI members, not just the course alumni.
- The meeting was officially named OER Office Hours.
- Each meeting will be focused on a topic. The topic of the April 22 meeting was OER Challenges. The June 23rd meeting topic is Fall OER Plans.

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

The U.S. Department of Education Open Textbook Pilot Grant was a 3-year award of \$2M for the creation of open textbooks. If CARLI had been awarded the grant, the distribution of the funds would have been through subgrants to members. The OER Committee provided support for CARLI's application process in several ways.

1. Committee members attended a brainstorming session to discuss and generate ideas for CARLI's application.
2. Committee members reviewed and provided comments on the grant proposal.
3. Institutional Letters of Support were submitted from the leadership of our individual libraries.
4. Data about high enrollment courses and textbook costs was gathered from Committee members' bookstores.

5. OER Committee members volunteered to work on the subgrant application process if CARLI was awarded the grant.

Open Education Network (OEN) Allied Membership

CARLI staff consulted the Committee about the Open Education Network's Allied Membership option. After reviewing the procurement process and gauging interest in the membership, the OER Committee decided to add the OEN Allied Membership option to the CARLI contract at the time of renewal instead of amending the current contract.

CARLI Preservation Committee

FY 2021 Annual Report of Activities and Projects

Members

Melina Avery	2020–2021	University of Chicago
Mary Burns	2017–2021	Northern Illinois University
Rob DeLand	2019–2022	VanderCook College of Music
Nora Gabor	2018–2021	DePaul University
Tonia Grafakos	2018–2021	Northwestern University
Susan Howell	2017–2021	Southern Illinois University Carbondale
Becky Koch	2019–2022	Illinois State University
Meghan Ryan	2016–2021	National Louis University, Co-Chair
William Schlaack	2018–2021	University of Illinois at Urbana-Champaign, Co-Chair

CARLI Board Liaisons: Fred Barnhart, Northern Illinois University and Pattie Piotrowski, University of Illinois at Springfield

CARLI Staff Liaisons: Elizabeth Clarage and Nicole Swanson

Meetings

The Preservation Committee met 11 times during 2020-2021:

- 11 conference calls (all meetings held online due to COVID-19 restrictions) – August 28, September 14, October 12, November 9, December 14, 2020; January 11, February 8, March 8, April 12, May 10, and June 14, 2021

Activities

- Maintained and updated the Preservation Resources webpage:
<https://www.carli.illinois.edu/products-services/collections-management/preservation-resources>
- Tonia Grafakos of Northwestern University Libraries hosted a CARLI Professional Development Alliance (PDA) event “Incoming Library Collections: A Unified Approach to Newly Acquired Material” (April 20, 2021) <https://www.carli.illinois.edu/pda-event-incoming-library-collections-unified-approach-newly-acquired-material>
- Adapted annual projects to meet the remote requirements of committee members, with the committee also acting as a conduit to share news updates regarding staff and collection decisions from member libraries. All meetings were conducted via Zoom.
- Annual Project 1: Reviewed and shared recommendations about the Preservation Committee’s Charge with the CARLI Board of Directors.

- Annual Project 2: Preservation Interviews <https://www.carli.illinois.edu/products-services/collections-management/preservation-interviews>
 - Building off the success of last year's annual "Preservation Tips" interview project and with the knowledge that this format works well in a remote work environment, this year's committee decided to conduct interviews that would provide readers with a "snapshot" of how various CARLI member libraries are handling the COVID-19 pandemic. <https://www.carli.illinois.edu/products-services/collections-management/preservation-response-covid-19>
 - Closure of physical locations
 - Creation of safety policies and guidelines for staff and library materials
 - Expanding access to digitized content
 - Maintaining awareness of emerging research and recommendations
 - Challenge in shifting to a work-from-home environment
 - Adapting and shifting projects to meet new realities imposed by COVID-19 restrictions
 - Budget and staffing cuts
 - Each Committee member asked questions prepared by them with input from the Committee members. With the help of the interviewees who agreed to be a part of our project and offered to share their experiences and knowledge, the Preservation Committee was able to offer a very interesting and informative series of interviews to the CARLI community. A summary of these interviews is provided at the end of this report. Questions were decided upon by the committee prior to the interviews are as follows (with some variation depending on the interview):
 - *What was your institution's original response to the statewide closure in March 2020?*
 - *Were there special considerations for how your institution handled physical resources?*
 - *What were some preservation or conservation activities that were accomplished during the closure?*
 - *How did the closure and then re-opening impact preservation/conservation at your institution?*
 - *What are you doing to fulfill patron requests during this time?*
 - *What is your institution doing to incorporate lessons learned into future practices?*
 - *What did you learn from this experience? Has your institution changed?*
 - *Which sources have you relied on to inform your institutional policies? How did you learn about those sources?*
 - CARLI Preservation Interviews for 2020-2021
 - **September: Introduction to Annual Project** – Meghan Ryan, Special Collections and Cataloging Librarian, National Louis University <https://www.carli.illinois.edu/products-services/collections-management/preservation-response-covid-19>

- Meghan discusses some of the challenges that libraries faced during the pandemic and introduces the Preservation Committee's annual project: A Snapshot of our Preservation/ Conservation Response to COVID-19.

- **October: University of Illinois at Urbana-Champaign** – William Schlaack (Digital Reformatting Coordinator, University of Illinois at Urbana-Champaign) interview with Jennifer Hain Teper (Head, Preservation Services, University of Illinois at Urbana-Champaign).
<https://www.carli.illinois.edu/products-services/collections-management/snapshot-uiuc>
 - Jennifer discussed the shifting of preservation staff and projects to a mostly remote environment, with a special focus given to a unique advertising collection that proved to be a great project for the circumstances.

- **November: DePaul University** – Nora Gabor (Rare Books Librarian, DePaul University) interview with Kyle Henke (Digital Archivist, DePaul University).
<https://www.carli.illinois.edu/products-services/collections-management/snapshot-depaul>
 - Kyle reflects on the projects preservation staff were able to accomplish remotely. Additionally, Kyle also reflects on what working remotely means for him as a digital archivist and highlights the opportunities that remote conferences and Twitter have brought to the field.

- **January: Chicago History Museum** – Melina Avery (Conservator, University of Chicago) interview with Ellen Keith (Director of Research and Access and Chief Librarian, Chicago History Museum).
<https://www.carli.illinois.edu/products-services/collections-management/snapshot-chicagohistorymuseum>
 - Ellen details how the Chicago History Museum transitioned from being a completely on-site workplace to the remote realities of COVID-19 restrictions.

- **February: Lake Forest College**– Meghan Ryan (Special Collections and Cataloging Librarian, National Louis University) interview with Anne Thomason (Associate Director of the Library and Head of Archives and Special Collections at Lake Forest College)
<https://www.carli.illinois.edu/products-services/collections-management/snapshot-lakeforestcollege>
 - Anne discusses how her institution collaborated to address the changes brought on by the pandemic, and how they shifted their focus to providing remote resources.

- **March: Southern Illinois University Carbondale-** Susan Howell (Cataloging and Metadata Librarian, Southern Illinois University Carbondale) interview with Susan Tulis (Associate Dean) with additional comments by Marissa Ellermann (Head of Circulation Services at Morris Library, Southern Illinois University Carbondale)
<https://www.carli.illinois.edu/products-services/collections-management/snapshot-southernillinoisuniversitycarbondale>
 - Susan and Marissa speak to their institution's task force creation to address the safety and needs of their community, and how they navigated filling requests and staffing.
- **April: Northern Illinois University-** Mary Burns (Special Collections Catalog Librarian) interviews Leanne VandeCreek, (Associate Dean for Public Services and Acting Associate Dean for Collections Management until September 1, 2020) and Sarah McHone-Chase, (Head of User Services and Faculty Librarian) with additional comments by Susan Kapost, (Head of the Technical Services Preservation Section at Northern Illinois University)
<https://www.carli.illinois.edu/products-services/collections-management/snapshot-niu>
 - Leanne, Sarah, and Susan discuss how they opened and operated their library in a very limited capacity after a month of closure, how they adjusted to meet the needs of their patrons, and how their environment was monitored and maintained while people worked remotely.
- **June:** Interviews in process

Respectfully submitted by

Meghan Ryan (National Louis University) and William Schlaack (University of Illinois at Urbana-Champaign)

Co-chairs, 2020–2021

CARLI Public Services Committee FY 2021 Annual Report of Activities and Projects

Members

Caitlin Archer-Helke	2019–2021	Saint Xavier University
Jessica Bastian	2020–2021	Illinois Central College
Krista Bowers Sharpe	2019–2022	Western Illinois University
Aaron Harwig	2017–2021	College of DuPage, Co-chair
Chad Kahl	2018–2021	Illinois State University
Cynthia Kremer	2019–2022	Joliet Junior College
Nestor Osorio	2017–2021	Northern Illinois University, Co-chair
Cory Stevens	2020–2021	Lake Forest College
Lesley Wolfgang	2019–2022	Saint John’s College of Nursing

CARLI Board Liaisons: Spencer Brayton, Waubensee Community College and Rob Morrison, National Louis University

CARLI Staff Liaisons: Elizabeth Clarage and Denise Green

Meetings

The Public Services Committee met eleven times by conference call.

Activities

The Public Services Committee presented a preliminary report to the CARLI Board of Directors in December. The Committee recommended its continuation as a CARLI standing committee in accordance with CARLI’s Statement of Values, noted how public services had become even more essential in the wake of the COVID-19 pandemic, and identified possible challenges and opportunities. The Committee also considered future projects and topics worth exploring on behalf of CARLI and its members. The Committee also included a change in the charge of the committee adhering to the EDI policies and guidelines established by the CARLI of Directors, and the commitment to act upon them. Finally, the preliminary report also addressed updates in the Committee’s charge, purpose, and vision. The Directors accepted the Committee’s recommendations, and the Committee presented its recommendations in final format in March.

The Committee assembled a presentation on Zoom titled *The Pandemic Made Me Do It* on Thursday, January 21, 2021. Chad Kahl moderated and Caitlin Archer-Helke and Lesley Wolfgang presented case studies. The central topics that were addressed were: Post-Covid, what changes in services should we keep in place; how has your outreach changed in the past year; and how will you incorporate this into your future outreach practices? 96 individuals registered for the first presentation. Outcomes of this

presentation were published in *Internet Reference Services Quarterly* (DOI: 10.1080/10875301.2021.1891183). Notes from the session are available on the CARLI website at <https://www.carli.illinois.edu/notes-pandemic-made-me-do-it-changing-public-services-january-2021>

The Committee conducted a second presentation on Zoom titled *Oops! The Pandemic Made Me Do It Again: Escape Rooms, Digital Displays, And More* on Friday, April 23, 2021. Aaron Harwig and Lesley Wolfgang moderated. Amy Chellino from Joliet Junior College discussed digital displays in a presentation entitled “Take Your Displays Online with Take 5,” while Leslie Starasta from Lincoln Christian University spoke on escape rooms with a presentation and accompanying slides entitled “Ticket to Discovery: Library Orientation.” 52 registrants attended the second presentation. Links to the presentation materials may be found at <https://www.carli.illinois.edu/oops-pandemic-made-me-do-it-again-digital-displays-and-escape-rooms>

Respectfully submitted,
Members of the 2020–2021 CARLI Public Services Committee

CARLI Resource Sharing Committee: FY 2021 Annual Report of Activities and Projects

Members

Belinda Cheek	2017–2021	North Central College
Kari Garman	2018–2021	Bradley University
Shelly McDavid	2019–2022	Southern Illinois University Edwardsville
Sarah McHone-Chase	2017–2021	Northern Illinois University (co-chair)
Marcella Nowak	2018–2021	College of DuPage (co-chair)
Janelle Sander	2019–2022	University of Illinois at Urbana-Champaign
Nathan Theborge	2018–2021	Trinity International University
Ashtin Trimble	2018–2021	Black Hawk College
Erin Zimmerman	2019–2022	Heartland Community College

CARLI Board Liaisons: Matt Ostercamp, North Park University and Dr. Sharon Silverman, Olive-Harvey College (City Colleges of Chicago)

CARLI Staff Liaisons: Debbie Campbell and Bradley Woodruff

Due to the Alma migration, for the FY21 year, CARLI determined that committees should keep current membership, to the extent possible, in order to allow the continuation of the work from this current year in light of “future work” still required for Alma and Primo VE. The Resource Sharing Committee also decided to keep the current co-chairs in place for FY21.

Meetings

The FY20-21 Committee year was during the COVID-19 pandemic, so all of our meetings took place via Zoom on the first Wednesday of every month (11:00 a.m.–12:30 p.m.). Since the committee primarily meets online, our regular operations were not impacted by the varied work environments we were all in during the FY21 year (remote work, partially open institutions, transitions, and/or reopened institutions).

Completed Terms

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

Belinda Cheek, North Central College (2017–2021)
Kari Garman, Bradley University (2018–2021)
Sarah McHone-Chase, Northern Illinois University (2017–2021)
Marcella Nowak, College of DuPage (2018–2021)
Nathan Theborge, Trinity International University (2018–2021)
Ashtin Trimble, Black Hawk College (2018–2021)

During the June 2021 meeting, the committee selected Shelly McDavid (SIE) and Janelle Sander (UIT) to be the committee co-chairs for the FY22 year.

Theme

Migration from Voyager ILS to Alma ILS with the Primo VE Discovery layer.

Annual Project

With the migration from Voyager to Alma, the Resource Sharing Committee focused their work in FY21 on multiple smaller projects, instead of one larger research project. These projects are outlined below.

Committee Charge; Review of Committee Charge

During the fall of 2020, the Resource Sharing Committee discussed our future, and evaluated our charge, as guided by the CARLI Board.

The current charge of the Resource Sharing Committee is as follows:

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

The committee may be assigned projects by the Board of Directors, or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The committee will identify educational and training needs within its scope of responsibility and its collaboration with other committees, and will develop workshops, seminars, webinars, or other education opportunities to meet the needs of the membership. The committee will prepare appropriate documentation and reports, and will submit an annual report of its activities and accomplishments to [the] Board of Directors.”

Overview of past work:

Working within this charge, the Resource Sharing Committee has typically focused tasks and discussion around Interlibrary Loan related processes and workflows, including the sharing of items among and between CARLI and I-Share member libraries, as well as the wider national and international Interlibrary Loan landscape. The topical expertise and involvement of the committee members provides a solid background for discussing and investigating resource sharing topics and issues. The committee has also periodically surveyed the CARLI membership on topics related to resource sharing overall, and those specific to I-Share, and has presented the resulting research including the Committee’s contextualization to the CARLI board.

The I-Share libraries used the Voyager software for 18 years, between 2002 and 2020. Towards the end of the Voyager software's tenure, the majority of workflows and best practices based on Voyager had already been established and were well-understood by I-Share member library staff. As such, while the committee would help with review of the existing documentation, we did not need to focus much time on developing workflows or testing Voyager's functionality. With the transition to Alma beginning in 2019-2020, the committee has been working with CARLI office staff to test and review resource sharing workflows in Alma, and to make sure the steps and involved tasks are clear to the I-Share member library staff.

Overview of ongoing and future work:

When considering the committee's charge going forward, we find value in continuing our resource sharing focus, and are interested in also incorporating more work on the overall category that Alma calls "fulfillment." Fulfillment is an umbrella term that includes resource sharing, digitization, traditional circulation related tasks and workflows such as reserves, checkin/checkout, fines, fees, blocks, and other patron-interfacing workflows. In Alma, this will also include consideration of the patron-facing/public-facing user account and requesting functionality in Primo VE.

Review of CARLI Resource Sharing Code

With the migration from Voyager to Alma, the committee worked with CARLI Office staff to revise and review the CARLI Resource Sharing Code. Primary work on this included removing Voyager-specific language, accounting for the suspension of ILLINET direct borrowing, and updating information on fines and processing fees.

Additional information was added for frequent topics that have been found to be pertinent, including out of state patrons, out of state campus collections, and outdated user information.

The document was also reformatted to make sections easier to find and reference.

Monthly Alma and Primo VE Release Notes Review

Committee members took turns reviewing monthly Alma and Primo VE release notes, highlighting any upcoming changes that would impact resource sharing processes and workflows. Any relevant changes were documented, shared with the committee, and published to the CARLI website:

<https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/ResSharReleaseNoteReview>

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

To connect with our CARLI library colleagues during the FY21 year, the committee decided to host once-a-month virtual group discussions on varied topics, facilitated by committee members to get the conversation going. Following a brief presentation or introduction, attendees at these semi-informal sessions could participate in Q&A and topical discussion.

Discussion Series: October 23rd Curbside/Contactless Pickup and Staffing Challenges

On Friday, October 23, 2020 at 11:00 a.m., the committee held the first installment of the monthly discussion series, "CARLI Resource Sharing in our New Age: Tips and Tricks in the Time of Alma and COVID." The first topic was a discussion on curbside/contactless pickup and staffing challenges during a pandemic. Marcella Nowak from College of DuPage and Belinda Cheek from North Central College began the session with a brief overview of how their libraries are responding to these topics, followed by discussion by participants. The session was not recorded to promote conversation, and those who attended of the 103 registrants had a lively chat.

Discussion Series: November 20 Alma Digitization Dos and Don'ts

On Friday, November 20, 2020 at 11:00 a.m., the committee held the second installment of the monthly discussion series. Ashtin Trimble of Black Hawk College and Sarah McHone-Chase of Northern Illinois University presented on configuring digitization requests and things to think about regarding workflow. This session, with 98 registrants, was recorded and posted to the CARLI website along with companion documentation: <https://www.carli.illinois.edu/carli-resource-sharing-our-new-age-alma-digitization-dos-and-donts>

Discussion Series: January 22 Primo VE Configuration and Customizations

On Friday, January 22, 2021 at 11:00 a.m., the discussion focused on configuring and customizing labels in Primo VE with a focus on Resource Sharing needs. Belinda Cheek of North Central College will discuss the considerations for configurations made to Primo VE labels by NCC library staff, and Jessica Gibson of the CARLI Office will explain the how-to steps and workflows for making similar changes for your institution. This session, with 81 registrants, was recorded and posted to the CARLI website along with companion documentation: <https://www.carli.illinois.edu/carli-resource-sharing-our-new-age-primo-ve-configuration-customizations>

Discussion Series: February 19 Material handling during COVID

On Friday, February 19, 2021 at 11:00 a.m., February's discussion focused on the impact of COVID-19 on handling materials and service provision in academic libraries. The session began with presentations from library staff at two academic libraries who have reacted differently to the pandemic. Marcella Nowak of College of DuPage detailed the impact on materials handling and the use of the hold shelf in a library that has remained closed to campus except for pickups. Kari Garman of Bradley University described the procedures devised for materials handling in a library that re-opened in August with (almost) full operations. The session was not recorded to promote conversation, and those who attended of the 80 registrants had a lively chat following the presentation.

Discussion Series: April 30 Alma Analytics Dashboards

On Friday, April 30, 2021 at 11:00 a.m., the CARLI Resource Sharing Committee's April Discussion focused on using Alma Analytics reports and dashboards to generate meaningful data for your library and stakeholders. The session started with a presentation by two different academic libraries and their approach to building and individualizing their dashboards to meet their data needs. Ashtin Trimble of Black Hawk College demonstrated the dashboard she created

to easily provide campus administration with current, relevant library data. While Shelly McDavid, from Southern Illinois University Edwardsville demonstrated the dashboard she's created to quickly generate and compile monthly circulation data. This session with 108 registrants was recorded and posted to the CARLI website, along with companion documentation: https://www.carli.illinois.edu/products-services/i-share/alma-analytics/ResShar_Dashboards20210430

Alma and Primo VE testing and troubleshooting

During the FY21 year, the committee led and assisted CARLI office staff in testing and troubleshooting many aspects of Alma and Primo VE. A list of these tasks and topics includes:

- Alma and Primo VE configuration:
 - Fulfillment Configuration
 - Reviewed implementation plans for “Resource Sharing Completed Request Cleanup job”
 - Tested Alma Personal Delivery for AFN- did not work as anticipated with AFN; not recommending setup/enabling at this time.
 - Discussed and recommended consortial term loans and bulk due date extensions
 - Guidance on timeline for enabling Lost processes in Alma:
 - Starting on or after May 1, each I-Share institution MAY enable the lost process and the optional automatic blocks for overdue items in Alma for their local patrons only.
 - Before the lost process is enabled for local patrons, library staff will meet with CARLI Office staff to review settings and patron notifications.
 - Your institution must have overdue notices enabled for at minimum 3 weeks in advance of enabling lost processes.
 - Please sign up for a meeting at least a week in advance of when you would like the lost process enabled in Alma for local patrons, as, we will need to schedule in a reminder notice for patrons with long-overdue materials before turning on the lost profiles.
 - All I-Share institutions MUST enable the lost processes in Alma on or before July 1 for local patrons.
 - All I-Share institutions MUST enable the lost processes and automatic blocks for overdue items in Alma on July 1 for I-Share patrons. [CARLI Office staff will complete these steps.]
 - Plans to Pilot: “Central Definition for Hiding Resource Sharing Button – Based on Institutions Location List” [Configuring Resource Sharing Restriction Rules for Primo VE](#) (ongoing into FY22)
 - Alma letters, letter formatting, and consortial intervals:
 - Courtesy Letter
 - On Hold Shelf Letter
 - On Hold Shelf Reminder Letter

- Ful Overdue And Lost Loan Notification Letter- composed consortial wording for I-Share patron reminder; to be sent twice (June 15 and June 24) before lost processes are enabled on July 1 for I-Share patrons.
- Documentation
 - Best Practices for Lost materials (ongoing work from FY 2020 was completed in FY 2021)
 - Best Practices for Damaged materials (ongoing work from FY 2020 was completed in FY 2021)
 - Alma Digitization workflows and configuration

CARLI Technical Services Committee: FY 2021 Annual Report of Activities and Projects

Members

Kathryn Dauksza	2019–2022	Illinois State Library
*Sarah Holmes	2021–2021	Northern Illinois University
Megan Kelly	2019–2022	Newberry Library, Co-Chair
Mingyan Li	2018–2021	University of Illinois at Chicago
Robin Mize	2019–2022	University of Illinois at Springfield
*Deborah Morris	2018–2020	Roosevelt University
Gayle Porter	2017–2021	Chicago State University
**Adrienne Radzwickas	2019–2020	Lincoln College
Joan Schuitema	2018–2021	Illinois State University
William Schultz	2018–2021	Eastern Illinois University, Co-Chair

*Sarah Holmes joined the Committee in February, 2021 as a replacement for Deb Morris, who left the Committee

**Adrienne Radzwickas was hired by CARLI over the winter, she still joined Committee meetings as CARLI staff rather than a Committee member

CARLI Board Liaison: Tammy Kuhn-Schnell, Lincoln Land Community College

CARLI Staff Liaisons: Jen Masciadrelli and Ted Schwitzner

2020–2021 Accomplishments

CARLI Committee Changes and Recommendations

- The Technical Services Committee provided the following recommendations:
 - Continuation of the Technical Services Committee
 - Creation of an Electronic Resources Committee and a Discovery Committee
 - Increase the number of working groups across CARLI Committees
- The Technical Services Committee suggested slight updates to the Committee charge to reflect post-migration needs and current issues in Technical Services. The updated charge reads as follows:
 - The CARLI Technical Services Committee works with CARLI staff and members to identify, develop, and encourage cooperation and collaboration in matters related to acquisitions, cataloging, authority control, serials, and electronic resources management. The committee will pay special attention to technical services operational and policy issues as they relate to library management systems operated and supported by the

consortium. The committee will identify efficient and cost-effective best practices, workflows, and training opportunities all while exploring means to promote Technical Services professional advocacy. The Technical Services Committee will collaborate with other CARLI committees and ad hoc groups to discuss issues of common interest and to facilitate joint program planning.

Annual Projects

- Work From Home Projects
 - The CARLI Technical Services Committee identified a widespread need and desire to collect ideas for work from home projects in an accessible clearinghouse style format that can provide CARLI constituents with potential projects and workflows for those that work in Technical Services areas
 - Project suggestions encompass several areas of Technical Services activities including Bibliographic Record Maintenance, Weeding processing, and Special Collection and Archives record updating
 - Also included is a list of other work from home sources
 - <https://www.carli.illinois.edu/products-services/i-share/physical-res-man/tech-services-wfh>
- Collection of Workflow Documents
 - The Committee devised a poll to assess individuals' perceived value of, or usefulness of Alma documentation produced by individual CARLI institutional members (if it were made available to them). Although Ex Libris and CARLI have both provided valuable resources, the Technical Services Committee identified through CARLI "Office Hours" and other online sessions that there was also an interest in learning about the specific Alma workflows of other institutions to assist in the performing of their local workflows. During the April 28, 2021, Technical Services Q & A session, a Zoom poll was conducted by CARLI staff, and several additional questions were presented for discussion.

Future plans

Alma will clearly remain at the center of CARLI constituents' attention for the immediate future as there continues to be a significant learning process that continues to evolve. Upcoming future activities will undoubtedly be related to that. The Technical Services Committee found the recent information gathered from the April Q&A session to be valuable, exposing a definite interest in the concept of sharing local Alma documentation and workflows. The Technical Services Committee has already initiated steps to produce a clearinghouse of sorts for such documentation, and plans for taking subsequent steps to gather documentation and establish this clearinghouse is already underway.

Especially during this incredibly challenging year as a result of the pandemic, the Committee expresses its deep appreciation for the assistance and support that the CARLI staff has provided to the Technical Services Committee during the past year.

***2020-2021 CARLI Technical Services Committee Annual Project:
Technical Services Work from Home Projects***

In the context of the pandemic, The CARLI Technical Services Committee also identified a widespread need and desire to collect ideas for work from home projects in an accessible clearinghouse style format that can provide CARLI constituents with potential projects and workflows for those that work in Technical Services areas. Below is a link to a page of work from home resources that the Committee developed:

<https://www.carli.illinois.edu/products-services/i-share/physical-res-man/tech-services-wfh>

Technical Services Work From Home Projects

BACKGROUND

The COVID-19 pandemic brought about significant changes in the work of librarians. This started with statewide (and nationwide) shelter in place orders that required people to work from home, and many people continue to work from home to various degrees. The work of Technical Services librarians lends itself to work from home projects.

The CARLI Technical Services Committee identified a widespread need and desire to collect ideas for work from home projects in an accessible clearinghouse style format that can provide CARLI constituents with potential projects and workflows for those that work in Technical Services areas.

This page is loosely organized into groups that serve as suggestions for a variety of work areas, including weeding, bib maintenance, and ideas particular to Special Collections and Archives. Where possible, links to more specific documentation related to workflows are provided. The Technical Services Committee would like to note that any documentation could potentially be dated, and is primarily intended to serve as guidelines to help get started on any given work from home project. The Committee welcomes ideas to add to this page which can be submitted via email to the Technical Services interest group list using techserv-ig@carli.illinois.edu.

Updated 5/19/2021

Work From Home Projects

BIB MAINTENANCE

- Find IZ bibs that are not linked to NZ and share (probable merge task)
 - → [Merging Network Zone Records](#)
 - → [I-Share Network Zone Cataloging Recommendations](#)
- → [Bound with clean-up](#)

HOLDINGS/ITEM MAINTENANCE

- Reduce duplicate holdings in the same location/move items to a single holding.
 - → [moving item records between holdings](#)

ITEM MAINTENANCE

- Review and correct enumeration/chronology for migrated serials records
- Move items to retain history or delete serials items for issues no longer in inventory
 - → [How-to: Withdrawing Inventory and Deleting Records](#)
- Standardize enumeration/chronology and description to make serials items sortable (and requestable)
- Review and update item record material types
- → [Review item record with status "Technical-migration"](#)

WEEDING

- Identify titles that need weeding
- Print sheets for staff to search online from home
- Online searching includes - OCLC, ABE, CARLI catalog, for holdings and value.
- Review physical titles in question, when in house.
- Develop new lists for withdrawal from home.

SPECIAL COLLECTIONS/ARCHIVES

- Create MARC records for finding aids
- While at the library, take pictures of single sheet/small items (posters, manuscript letters, fragments, etc.) create catalog records while working from home, complete next day in the library.
- If able, bring home small collections of similar materials (pamphlets, sheet music, etc.).
- Add citation/reference notes (510s) and/or exhibition notes (585s) to records.

WORK FROM HOME SOURCES

- ↗ [Harvard Remote Work Project Ideas for TS](#)
- ↗ [Shana L. McDanold's Cataloging/Metadata Remote Work List](#)
- Randall, Ryan P. and Jennifer LC Burke. "↗ [Library, Archives Workers Share Work-From-Home Ideas.](#)" *Library Journal*, April, 23, 2020.
- ↗ [District of Columbia Public Library, Washington, DC Cataloging remote work project list](#)

Alma Workflow Documentation

- During the April 28, 2021 Technical Services Q & A session, the Zoom poll was conducted by CARLI staff, and several additional questions were presented for discussion. Fifty participants responded to the Zoom poll.
 - The following were the poll items participants responded to:
 - *I have local Alma workflow documentation that I would be willing to share publicly on the CARLI website.*
 - *Sometimes local documentation has personal names or other uniquely local information (locations, room numbers, etc.). I would still appreciate having access to documentation of local Alma practices even if I have to make my own adaptations.*
 - *I would find local Alma procedures and practices documentation from other CARLI libraries helpful.*
 - The following questions (and their respective answers) were the questioned offered for discussion during the Q&A:
 - *Are there any particular Alma workflows or processes that you are interested in learning how other handle?*
 - ❖ Workflows that don't use acquisitions
 - ❖ Setting up normalization rules
 - ❖ Ordering/activating ebooks & other eresources
 - ❖ Acquisition workflows for the single-person department
 - ❖ Reports for cataloging clean-up and maintenance

- ❖ Serials: claims, PO setup, prediction
- ❖ Shelf-ready processes
- ❖ Ebook and ejournal workflows
- ❖ Bibliographic record choices for electronic resources (import vs. CZ while keeping CZ portfolio)
- ❖ Best practices for local data (local extensions, holdings, items)
- ❖ Record selection for the non-Technical Services librarian
- ❖ Import workflows preferences
- ❖ Local withdrawn procedures
- ❖ Acquisitions for the cataloger
- ❖ Bound-withs
- Which, if any, Alma workflow documentation external to CARLI or ExLibris did you find helpful?
 - ❖ Harvard
 - ❖ SUNY
 - ❖ Cal State
 - ❖ Orbis Cascade
 - ❖ UIUC