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**2019–2020 CARLI Public Services Committee:  
Annual Report of Activities and Projects**

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**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	(2017–2020)	College of DuPage, Co-chair
Chad Kahl	(2018–2021)	Illinois State University
Cynthia Kremer	(2019–2022)	Joliet Junior College
Nestor Osorio	(2017–2020)	Northern Illinois University, Co-chair
Elizabeth Sterner	(2019–2020)	Governors State University
Lesley Wolfgang	(2019–2022)	Saint John’s College of Nursing

Mid-Year Committee Changes:

Katherine Sleyko	(2018–2019)	Prairie State College
Joanna Wilkinson	(2019)	North Park University
Reina Williams	(2018–2020)	Rush University

CARLI Board Liaisons: Spencer Brayton, Waubensee Community College, John Small, North Central College  
CARLI Staff Liaisons: Elizabeth Clarage and Denise Green

**Meetings:**

The Public Services Committee held one in-person meeting at Illinois State University and met ten times by conference call.

**Activities:**

The Public Services Committee invited the Instruction Committee to collaborate on its programs this year as there was great overlap of interest in the Primo VE implementation between the two committees.

The Committee identified five areas of interest and created subcommittees to continue exploring each topic.

Those areas were:

- In-Person Training
- Creating User Guides/Tutorials/Scripts
- Customization of Primo VE
- Literature Review and Research
- User Experience and Usability Testing

Over the course of the year, the five subcommittees merged into three groups:

- In-Person Training (which then became a virtual program)
- Creating User Guides
- User Experience and Usability Testing

After exhaustive research, the Literature Review and Research subcommittee determined that there was very little in the library literature regarding Primo VE as the product is new. The group then determined as it was beginning to search the internet for resources, that this function made sense to do in the specific topical subgroups rather than its own subcommittee.

As the Customization of Primo VE subcommittee commenced its work, the group determined that combining with the User Experience and Usability Testing made sense, as the group realized how the user would experience the system synergized with the customization group's knowledge of how to work with the system. Additionally, CARLI staff's creation of information pages for members about customization led to the subgroup deciding to support and promote that customization guide rather than create a duplicate guide. The Public Services Committee conducted the following activities in preparation for the Alma/Primo VE transition:

- **Getting Ready for Primo VE**

Developed and conducted a daylong webinar with the CARLI Instruction Committee and CARLI staff on Thursday, April 2, 2020. The event was originally planned to be an in-person event held at Joliet Junior College with an online streaming option. It was switched to online only due to the coronavirus pandemic.

The day included seven presentations as well as a welcome to the day and an ending roundup. Each session had specific start times so that those not joining for the entire day, would know when a specific session would begin. Committee members helped throughout the day by handling the open and closing sessions, being presenters for three sessions, keeping time for the presenters, keeping track of questions for the presenters, and answering some questions as they arrived in the chat including ones about the technology used for the program.

The day was planned as an introduction to Primo VE to the CARLI membership specifically aimed at librarians and library staff. The day was organized with sessions first introducing the topic of discovery searching and a roadmap for Primo VE and then progressed to specifics about CARLI's implementation of Primo VE followed by sessions that included examples for introducing the new system to campus.

Evaluations for the program were extremely positive. For the question, "For this program, Getting Ready for Primo VE, what did you find most useful and why?," every presentation had someone note that the session was the most useful. One person noted, "In terms of substance and expression, it was the best program I have ever seen in my 40+ years of library work."

The evaluation respondents had an average response of 89 (out of 100) to the question, "Overall, the program was worthwhile to me."

For those respondents that identified what might have improved the program, their constructive responses will be helpful for planning future programming.

- Registrants: 287
- I-Share Libraries Represented: 80
- Getting Ready For Primo VE Slides and Presentation Recordings URL:  
[https://www.carli.illinois.edu/products-services/pub-serv/Getting\\_Ready\\_for\\_Primo\\_VE](https://www.carli.illinois.edu/products-services/pub-serv/Getting_Ready_for_Primo_VE)

- **Creating User Guides**

The Creating User Guides & Tutorials subcommittee assessed the landscape of existing Primo VE tutorials and then developed materials to help guide CARLI libraries in their creation of such,

including: the topics to prioritize, the pitfalls to avoid, technical aspects to consider, and the most appropriate formats for delivering information to patrons using Primo VE. These materials include "Know Before you Go (Live): Advice for Creating Primo VE User Guides," a presentation given at Getting Ready for Primo VE on April 2, 2020, as well as a webpage that expanded on the material of the presentation with further information and helpful resources. The webpage "Creating User Guides for Primo VE" is available on the CARLI website at: [https://www.carli.illinois.edu/products-services/pub-serv/Creating\\_User\\_Guides\\_PrimoVE](https://www.carli.illinois.edu/products-services/pub-serv/Creating_User_Guides_PrimoVE)

- **User Experience and Usability Testing**

The subcommittee met monthly to discuss user training and usability. However, as access to the new discovery layer, Primo VE, was not available until February 2020, the subcommittee focused its energy on planning programs for the in-person program which then turned into a virtual event. The two well received programs were:

- Introducing a New Discovery Service to Your Campus
- Usability Basics: Test With Your Users

This subcommittee recommends that Public Services Committee consider user experience and usability of I-Share in 2020-2021.

Respectfully submitted,  
Members of the 2019–2020 CARLI Public Services Committee