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 Thebarge	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 Thebarge, 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 (UIU) 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