CARLI Collection Management Committee
Summary of Past and Current Activities and Projects
November 2019

Full 2018-2019 Project Report is available on the CARLI website:
https://www.carli.illinois.edu/sites/files/files/FY19_CMC_Project.pdf

Completed Projects in 2018-2019
- **Textbook Reserves and Curriculum Materials** – The subgroup completed the data analysis phase of the project. The findings were included in the committee's annual report.
- **Change Is Good: You Go First! Leading Others To and Through Change** – Co-sponsored this one day forum with the Technical Services Committee that focused on managing change. Held at University of Illinois at Chicago, April 2, 2019.

Ongoing Projects for 2019-2020
- **Open Access eBooks** – Developed a website that describes the project and will be updated as the project continues. The URL is https://www.carli.illinois.edu/products-services/collections-management/OA_eBooks. No additional collections will be added to Voyager in 2019-2020. The subgroup of committee members will continue working to identify further eBook collections. Adding of new open access ebook collections will resume after the completion of the Alma implementation. This committee will also look at making a recommendation to CARLI regarding how these collections may appear in Primo VE and exploring what is available in Network Zone.
- **Collection Statistics Webinars** – This project is on hold and will resume after the Alma migration and will integrate analytical data available in Alma for collection decisions.

New Projects for 2019-2020
- **Weeding Electronic Books** – The committee will review the available literature for weeding ebook collections and then determine if recommendations should be made for institutional ebook collections and the consortial ebook collection.
- **Mentor Volunteer Repository** (was: Survey of print book practices)
  This initially began as a discussion of academic print monographs and how CARLI member libraries are handling these considering shrinking materials budgets and the pressures of digital content demand. The discussion soon broadened, and this subgroup has now decided to pursue the creation of a resource for librarians who have experience in a particular type of project or other professional activity to share their expertise. The idea would be to create an evolving directory of colleagues willing to share their experience in implementing a particular project in their libraries. Participants would agree to provide basic guidance on such projects, with the understanding that they are volunteering their time only to help another library get a project going and avoid pitfalls they have identified through their own experience. Mentors would not provide ongoing consulting on a granular level. The subgroup will continue to meet to flesh out the details of this initiative.

CARLI 2018-2019 Commercial Products Committee Annual Projects

Members:
Lesley Wolfgang, Chair (Saint John's College of Nursing)
Xiaotian Chen (Bradley University)
Will Midgley (University of Illinois at Chicago)
Jim Millhorn (Northern Illinois University)
Thane Montaner (Prairie State College)
Kavita Mundle (University of Illinois at Chicago)
Jeff Matlak (Western Illinois University)
Edith List (Principia College)
Amanda Wiesenhofer (Lincoln Land Community College)
CARLI staff liaisons: Cindy Clennon, Jennifer Taylor

Emerging Issues in E-Resources conference project:
The committee planned and hosted a one-day symposium devoted to understanding two current issues in electronic resources management: usage statistics and streaming video. The event was held at the iHotel in Champaign on March 26, 2019. There were approximately 50 attendees and the evaluations were positive. The presentations included:

Keynotes:
- Role of Usage Statistics in the Library Value Proposition by Dennis Krieb (Lewis & Clark Community College)
- Future Plans for Usage Statistics in Streaming Video Resources by David Parker (ProQuest)

Panel:
- Tools and Practices used in Collecting Usage Statistics and How it Shapes Collection Decisions: CORAL (Southern Illinois University Carbondale), LibInsight (Chicago State University) and MS Access & INTOTA (Principia College)

Presentations:
- Streaming Video Resources in Libraries: Jumping into the Stream: Kanopy (Chicago State University)
- Consortia Manager (CARLI)

VPAT Collection and Analysis:
The committee created a VPAT (Voluntary Product Assessment Template) repository on CARLI's website. VPAT documents are created by vendors to detail the accessibility of a specific product and were collected by committee members by searching vendor websites and corresponding with vendor representatives. Reports were collected and posted on the CARLI website at http://www.carli.illinois.edu/vpat-repository and can be used by libraries as they examine the accessibility of electronic subscriptions. It is the intention of CARLI staff to keep this page up to date as new VPATs are released or are updated.

2020 Planned Projects:
The committee drafted, distributed and analyzed results of an e-resources interest survey sent to CARLI members to determine which products to prioritize and focus on during the upcoming year. The committee is also planning a webinar series on Alma e-resources management and workflows in spring 2020.

CARLI Created Content Committee
2019 Annual Meeting Report

CARLI Created Content Committee Members
Ellen Corrigan (EIU), Hunt Dunlap (WIU)
Marlee Graser, co-chair (SIUE)
Colin Koteles (College of DuPage)
Tricia Lampron, co-chair (UIUC)
Greer Martin (Loyola)
Ariana Potter (Pritzker Military Museum & Library)
Matthew Short (NIU)
Angela Yon (ISU)
CARLI Staff Liaisons: Amy Maroso and Elizabeth Clarage
Board Liaison: John Pollitz (SIUC)

Report of Activities and Projects: 2018-2019

The CARLI Created Content Committee focused its work on two main themes: the promotion of digital collections and linked data education. The committee surveyed CARLI member libraries to gauge their use of social media to promote digital collections. Using data from the survey, the committee began using the CARLI Facebook page to promote digital collections, developing a form for member libraries to submit content. The committee also organized a three-part webinar on linked data with five presentations, six presenters, and a total of 174 registered attendees.

Form for submitting Facebook content: https://forms.gle/Yn5bUpWfbk6Z3g298

Linked Data: the view from 30,000 feet (Jodi Schneider): https://www.youtube.com/embed/J1AWdit_bCY

Linked Data in the Library (Laura Akerman and Jodi Williamschen):
https://www.youtube.com/embed/KCFExYHGaIo

Linked Data Projects (Greer Martin, Demian Katz, and Matthew Short): https://www.youtube.com/embed/-RZHhjy-ncA

Report of Planned Activities and Projects: 2019-2020
The committee will focus on continuing the promotion of digital collections through the CARLI Facebook page and sending member libraries data on Google analytics related to their CARLI digital collections. The committee is also planning a webinar series related to building and capturing the value of digital collections through assessment, metadata practices, and teaching/curriculum development. A call for proposals for the webinar series was distributed to the CARLI membership in late September 2019. The committee will also organize and sponsor an in-person workshop instructing on tools related to data cleaning and reconciliation to be held in the late-Spring.

Call for Proposals submission form: https://forms.gle/aYZZTRwtKw9k1ocp9

CARLI Instruction Committee,
2019 Annual Meeting Report

Theme: Inclusive Classrooms: Cultivating Learning Environments for Students With Diverse Identities
Through this theme the committee investigated ways that academic librarians can create a more inclusive learning environment in which diverse participants and perspectives are fully engaged and equally valued.

- WEBINAR SERIES
    - **"Intrusive Librarianship."** presented by Annette Alvarado, Reference and Instruction Librarian and Liaison to Arrupe College, Loyola University Chicago | *Online* |February 13, 2019.
        - In this webinar, Alvarado discussed how intrusive advising has been adopted at Arrupe College to meet the needs of underserved students and has been successful in reaching students that otherwise would not have asked for help.
    - **"A Work in Process: Cultivating Inclusive Classrooms."** presented by Robin Harris, Michelle Oh, and Alyssa Vincent, Librarians at Northeastern Illinois University | *Online* |March 12, 2019.
        - In this webinar, the presenters shared their lessons learned and experiences with teaching information literacy to a diverse student population.
    - Webinar recordings are available on the CARLI website: https://www.carli.illinois.edu/products-services/pub-serv/instruction

- INSTRUCTION SHOWCASE
    - The 7th Annual CARLI Instruction Showcase was held at North Park University on May 23, 2019. The morning program included the workshop "No Shortcuts: Culturally Sustaining Pedagogy in Library Instruction and a Self-Reflexive Practice" facilitated by Kellee Warren from the University of Illinois at Chicago. Slides and handouts are available on the CARLI website: https://www.carli.illinois.edu/products-services/pub-serv/instruction

- ADDITIONAL ACTIVITIES
    - The committee hosted Twitter Chats on December 7th and April 19th. The official hashtag for both live events was *#InclusiveInfoLit*. A list of resources is available on the CARLI Instruction website: https://www.carli.illinois.edu/products-services/pub-serv/instruction/InclusiveInfoLit
    - The committee collaborated with the Library Sessions Podcast, created by Martinique Hallerduff (Dominican University) and Jennifer Lau-Bond (Oakton Community College) to host a podcast series about the various approaches to creating an inclusive classroom and library. Podcast recordings are available on the Library Sessions website: https://thelibrarysessions.wordpress.com

2019-2020, FUTURE PLANS

Theme: Fresh Starts & Restarts: Growing Beyond Your Comfort Zone
Whether you are a freshly minted librarian—new to the profession and new to instruction—a more practiced information professional with vast instructional experience now taking on new responsibilities, or someone working with new instructional modes, CARLI's Instruction Committee wants to help you discover tips, tricks,

and techniques that will assist you as you create engaging and innovative information literacy curricula. Through webinars, Twitter chats, our new article club, and the annual Instruction Showcase, this year's theme will explore accessibility, inclusivity, and multimodality, as well as cutting-edge pedagogy and praxis.

- PLANNED ACTIVITIES
  - **Article Club**: Watch for Fall, Winter, and Spring event announcements! Fall installment planned for 11/6/2019, https://www.carli.illinois.edu/instruction-committee-article-club-november
  - **Twitter Chat**: Watch for Fall and Spring event announcements! Fall chat on "New Approaches to Evaluating Information" planned for 12/13/2019, https://www.carli.illinois.edu/InstructionTwitter191213
  - **8th Annual CARLI Instruction Showcase**: Coming May 2020. Watch for save-the-date announcement!
  - **Collaboration with CARLI Public Services Committee for Primo VE subcommittee projects**

CARLI Open Educational Resources Task Force
2019 Annual Meeting Report

This year, the Open Educational Resources Task Force (OERTF) will continue to provide training opportunities and resources for CARLI members and keep abreast of developments with OER and academic publishing to better update the membership on these topics.

In June 2019, the CARLI Board agreed to extend the Task Force for an additional year until June 30, 2020 as open educational resources in higher education continues to be an evolving topic, and many CARLI members are seeking support in advancing OER adoption and creation on their own campuses.

Recent Activities – October 2019
The Task Force announced a program to support the registration fee and travel needs of up to five CARLI members if they are accepted into the Open Textbook Network Certificate in OER Librarianship program.

The Task Force submitted a proposal to the Illinois Library Association's Public Policy Committee for consideration for its legislative initiative to support a grant program to be administered by the Illinois State Library to encourage the use and creation of no-cost open educational resources in Illinois' post-secondary institutions of education. The program would provide funding to ILLINET academic libraries to support building library programs and services that support faculty and staff in producing open educational resources.

Other Activities
- **Survey**
  - Surveyed member institutions on OER activity and support needs
    https://www.carli.illinois.edu/sites/files/coll_man/2017_CARLI_OERSurvey.pdf
- **Resources**
  - Developed OER resources pages for CARLI website
    https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-overview
  - Created CARLI-OER email list
    To join: https://carli.illinois.edu/cgi-bin/mailman/listinfo/carli-oer
  - Adapted a customizable Open Textbooks/OER Brochure & one-page overview of Open Access vs. Open Educational Resources
    https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-getting
- **News**
  - Provide regular OER Updates in CARLI newsletter

Training and Consultation
  - Webinars
    https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-presentations
    - Promoting OER On Your Campus: Basics and Best Practices, January 2018
    - Open Education Week - Joint Webinar with LOUIS, March 2018
    - Building an OER Workshop for Your Campus, May 2019

- o In-Person Workshops
  - ▪ Open Textbook Network speakers, April 2018
  - ▪ OER Workshop, April 2019
- o Presentations
  - ▪ Illinois Library Association Conference, October 2017
  - ▪ Open Education Southern Symposium, October 2018
- o Open OER Phone Calls for CARLI members
  - ▪ October 16, 2018 and January 15, 2019
- **Publication**
  - o Book chapter in Open Access, Open Praxis: Digital Scholarship in Action. ALA Editions, 2019

Current Task Force Membership:
Annette Alvarado, Loyola University Chicago
Sara Rachel Benson, University of Illinois at Urbana-Champaign, **co-chair**
Anne Chernaik, College of Lake County
Connie Ghinazzi, Augustana College (2018-2019)
Kathy Ladell, Northern Illinois University, **past chair**
Elizabeth Nelson, McHenry County College
Anne Shelley, Illinois State University, **past chair**
Susan Shultz, DePaul University
Janet Swatscheno, University of Illinois at Chicago, **co-chair**
Linda Zellmer, Western Illinois University
CARLI Staff: Anne Craig, Elizabeth Clarage, Lorna Engels

Current charge:
The Open Educational Resources Task Force will support CARLI's commitment to the "Open Illinois Initiative," namely participation in the Open Textbook Network (OTN), cooperation and collaboration on open educational resources (OERs), and identification and development of 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 membership of the OER Task Force may include System Leaders (attendees of the Open Textbook Network Summer Institute), staff from CARLI Members that have an Institutional OTN Membership, and staff from CARLI members already using OERs.

Beyond the Book: Preserving Your Non-Book Collections
CARLI Preservation Committee Annual Project 2018-2019
https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book

Project Overview (Ann Linsey, Head of Conservation, The University of Chicago Library)

Throughout the 2018-2019 academic year the CARLI Preservation Committee wrote a series of preservation tips that culminated in this website of beyond the book resources. Each newsletter tip focused on an unusual item or group of similar items that you might encounter in your collection. Each author recounted their own story about an unusual item they have encountered in their collection, the challenges these items presented, and how they ultimately decided to best preserve that item or items. Where it is relevant, they also provide places to find more information or best practices. The more we know about how to preserve non-book items, the better our decision making can be.

Board Games & Materials with Multiple Parts (Nora Gabor, Rare Books Librarian, DePaul University)
Preserving board games is not always as simple as putting the box on a shelf. They contain many parts constructed from different kinds of materials. The goal is to protect and preserve the integral parts of the game by safely storing them all together, preferably in one enclosure. This article discusses the preservation enclosure created for the board game Blacks and Whites: The Role Identity & Neighborhood Action Game published by Psychology Today in 1970.

Maps & Blueprints (Susan Howell, Southern Illinois University Carbondale & William Schlaack, University of Illinois at Urbana-Champaign)
Even though maps and blueprints are primarily paper and require the same care and consideration as other paper materials they still pose their own unique challenges. They do not have a binding or protective cover and their size, storage and how they are used pose unique challenges. This article highlights preservation work done for 19th century maps and blueprints used on a construction site.

Microfilm (Ann Lindsey, The University of Chicago Library & William Schlaak, University of Illinois at Urbana-Champaign)
Although the first patent for microfilm dates from 1859 it was not used on a large-scale in the United States until 1935. This article looks at the best practices for the care and handling of modern and contemporary microfilm. It also highlights nitrate, acetate and polyester films and provides one librarian's first-hand experience with nitrate film.

Paintings (Tonia Grafakos, Marie A. Quinlan Director of Preservation, Northwestern University)
Many libraries own paintings that may be part of a collection, a donation, or part of the institution's history. Some of the preservation concerns are the same as for other library materials such as providing a stable environment without fluctuating temperatures and humidity. Paintings present their own unique set of challenges because they

are hung in public spaces and may be difficult to store. This article demonstrates how some of these challenges were met for the painting Matrix by artist Oli Sihvonen.

Photographs -- General Overview (Meghan Ryan, Special Collections and Cataloging Librarian, National Louis University)
There is not a one size fits all preservation strategy for photographs. They may be commonly held in library and archival collections but their chemical composition demand special care that goes beyond typical preservation environments. This article provides an overview of the necessary basics of photograph preservation and highlights resources devoted to their care.

Photographs -- Glass Plate Images (Emma Saito Lincoln, Special Collections Librarian, Augustana College)
The same general preservation guidelines that apply to all photographic collections also apply to glass plate images. This article discusses the unique preservation needs of glass plate images in terms of their storage and handling. "Glass plate image" is used as a catch-all phrase to include all images on a glass base.

Scrapbooks (Mary Burns, Special Collections Catalog Librarian, Northern Illinois University & Meghan Ryan, Special Collections and Cataloging Librarian, National Louis University)
Scrapbooks are unique items that may contain a wide variety of materials including photographs, cards, newspaper clippings, pressed flowers, and art work. The diversity of the materials can present daunting preservation challenges. This article highlights some of the problems conservators must address.

Textiles (Emma Saito Lincoln, Special Collections Librarian, Augustana College)
The general principles of preservation involving environmental control, pest management and preventive conservation also apply to textile collections. However, the storage needs of textiles and their fragility make their preservation requirements distinct from book and paper collections. This article explains some of the techniques used to preserve a pair of autographed shoes worn in a Broadway production and a World War I Band uniform.

In-Person Events
The CARLI Preservation Committee hosted two preservation events in support of this project: *Choosing and Constructing Protective Enclosures for Library Materials w*orkshop held at the Abraham Lincoln Presidential Library and Museum on May 8, 2019 and *Conservation Lab Open Houses at the Abraham Lincoln Presidential Library and the Illinois State Military Museum* on June 7, 2019. Attendees at the protective enclosures workshop learned what to consider when choosing appropriate housings, built wrappers for thin books, and built e-flute clamshell boxes. Attendees of the conservation lab open houses learned how the Abraham Lincoln Presidential Library and the Illinois State Military Museum are conserving unique materials in their collections including: a U.S. Civil War violin, a child's hand-painted tea set, military flags, coats, helmets, and other items. Learn more about how the institutions conserve and house these materials and view photos in this full article.

CARLI Preservation Committee 2019-2020 Project
The Committee will be conducting email interviews with Preservation Managers, Conservators and others who work in libraries with specific knowledge or who have had an interesting experience related to preservation. Topics include planning surveys and assessments, exhibit design and preparation, staff training and emergency response. The interviews will be shared in the Preservation Tips section of the Monthly *CARLI Newsletter* and on the CARLI website. The Committee is planning a Preservation Open House in Spring 2020.

Assessment of Public Services
2018-2019 CARLI Public Services Committee Annual Project

Committee members: Rachel Bicicchi, Marissa Ellermann, Aaron Harwig (co-chair), Chad Kahl, Joanna Kolendo (co-chair), Nestor Osorio, Katherine Sleyko, Nancy Weichert, and Reina Williams
CARLI Staff Liaisons: Elizabeth Clarage and Denise Green

The assessment of library services, collections and operations is an essential practice for determining their efficiencies and the quality of services for their users. The CARLI Public Services Committee has engaged this year in exploring ways to develop assessment methods for typical public services activities.

We have proposed in this project simple assessment methods that would not require a lot of technical expertise and for a low cost to implement. These methods can also be adapted with higher technology devices, apps or software packages as available. The CARLI report includes lists of standards, case studies, articles, web pages, and books; a section on assessment methods; and a section on assessment instruments and additional tools. This project is located on the CARLI website at https://www.carli.illinois.edu/products-services/pub-serv/assessment-public-services-academic-libraries.

Assessment methods include:
Circulation Unit Assessments
Assessment Title: Web page for Circulation - Design
Assessment Title: Reference Services at Circulation
Assessment Title: Laptop Usage Survey
Assessment Title: Circulation: Turnaround of Shelving
Assessment Title: Assessment of Circulation Desk Services
Document Delivery Services Assessment
Assessment Title: Processing Time for Interlibrary Loan Requests
Assessment Title: Web Page for Document Delivery - Design
Assessment Title: Reference Services at Document Delivery
Assessment Title: Annual Count of Borrowing and Lending, and Traffic Report
General Public Services Assessment
Assessment Title: Public Services Assessment Survey
Reference Services Assessments
Assessment Title: Reference Desk Services
Assessment Title: Reference Interaction Survey
Assessment Title: Research Consultations (Not at the Reference desk)
Assessment Title: Outreach/Liaison Activities
Assessment Title: Google Analytics, LibGuide Stats
Assessment Title: Subject LibGuides Usability Design
Assessment Title: Web Page Content and Design (Main Library Page)
Assessment Title: Services for Students with Disabilities
Reserves Unit Assessments
Assessment Title: Web Page for Reserve - Design
Assessment Title: Faculty Satisfaction Survey
Assessment Title: Data of Traditional and Digital Reserve Items
Space Utilization
Assessment Title: Survey of Space Utilization
Assessment Title: Gate Count

Public Services Preparing to Welcome PRIMO VE
2019-2020 CARLI Public Services Committee Annual Project

Committee members: Krista Bowers Sharpe, Aaron Harwig (co-chair), Chad Kahl, Nestor Osorio (co-chair), Katherine Sleyko, Elizabeth Sterner, Joanna Wilkinson, Reina Williams, and Lesley Wolfgang
CARLI Staff Liaisons: Elizabeth Clarage and Denise Green
CARLI Board Liaisons: Spencer Brayton and John Small.

In keeping with CARLI's organizational focus on the upcoming Alma/Primo VE migration, the CARLI Public Services Committee will study five focus areas related to the Alma migration and Primo VE Adoption for its 2019-2020 Annual Project. The five areas and objectives include:

Exploring the customization of Primo VE interface and offer different options for schools to select

Provide practical directions for the UI Customization Package Manager. Create examples of customized interface models.

Creating user guides/tutorials/scripts on how to use the interface, depending on the audience

Create initial resources and models to help individual schools develop their own student-focused guides based on objects provided by the committee. Explore the use of guides.

Literature review and research

Using bibliographic databases, a list of relevant articles about public services role in implementing a PRIMO VE configuration will be prepared. Other resources like web pages and blogs would be included.

User experience and usability testing

A number of usability tests will be identified that can be used by schools to measure the effectiveness of in-house created tools.

In-person training

Determine geographically centralized locations for training. Create a schedule of training sessions for February, March, April (Spring Break). Develop appropriate materials for the sessions. Work with the CARLI staff on the logistic to provide the training sessions.

Opportunities for collaboration

The CARLI Instruction Committee has expressed interest in collaborating with the Public Services Committee on two focus areas: Creating user guides/tutorials/scripts on how to use the interface, and In-person training. Other opportunities for collaboration may present themselves based on the evolution of this project and other CARLI committee annual projects.

CARLI Resource Sharing Committee

2018-2019, In Review

The I-Share Universal Borrowing standards were fully implemented across the consortium in 2012. As part of their 2018-2019 committee work, the CARLI Resource Sharing Committee saw a need to review the policies to make sure they reflected the current requirements of library patrons at CARLI I-Share member institutions, and suggest possible revisions.

As shown in the Committee's 2018-19 Report, from the electronic survey distributed to the I-Share member libraries, the consensus for some policies was to keep them the same. Feedback on other policies suggested that the respondents thought changes were necessary. In view of the latter group of responses, in addition to some Voyager data analysis, Committee members determined updates to the Universal Borrowing Standard Policy that they would like to propose to the CARLI Board. However, after the Committee began its work on this project, the CARLI I-Share Next Task Force announced the Ex Libris Alma system as the replacement to Voyager. The Committee tabled making recommendations to the CARLI Board during the 2018-19 term in order to have time to evaluate how the migration to Alma might affect the recommendations.

Full Annual Report: https://www.carli.illinois.edu/sites/files/files/FY19_RSC_Project.pdf

2019-2020, Future Plans

The Resource Sharing Committee is focusing their 2019-2020 work on the I-Share Libraries' transition from Voyager to Alma, through a series of investigations, many TBD following work in the Alma test environments.

As a first project this year, the Committee is researching, with the intent to propose to the CARLI Board, best practice thresholds for Voyager patron record, charge transaction, and fine and fee cleanup for both local and I-Share patrons in preparation for the spring 2020 Production Data Load. The areas of this topic include:
- Recommended "forgive in Voyager if fine/fee older than…" date for local patrons.
- Recommended "forgive in Voyager if lost item older than…" date for local patrons.
- Required "forgive in Voyager if fine/fee older than…" date for I-Share patrons.
- Required "forgive in Voyager if lost item older than…" date for I-Share patrons.
- Amnesty for all overdue fines owed by I-Share patrons.
- Purging patron records with only "historical" fines and fees.
- Recommended "purge patron records with expiration date before…" for local patrons.

Other topics the committee may work on this year include:
- Reviewing/applying the I-Share standard policies to Alma settings/functionality, including making recommendations for change to the CARLI Board.
- Review of Ex Libris available documentation for resource sharing.
- Crafting/collating best practice how-to for the Automated Fulfillment Network in Alma.
- Crafting/collating best practice how-to for pick list and hold shelf workflows.
- Assisting in the testing of receipt printers.
- Assisting in the testing of Alma's additional resource sharing functionality, including personal delivery, document delivery, and resource sharing beyond I-Share.
- Other topics as appropriate.

2018–2019 CARLI SFX Systems Committee Annual Project:
Getting Ready for I-Share Next

The SFX Systems Committee studied Alma/PrimoVE resources and tutorials and developed recommendations to get ready for the Alma/PrimoVE migration.

Topics addressed:

- Comparing targets in local SFX instances with the CARLI SFX Shared instance: Committee members developed and tested procedures to review both licensed/commercial and free/open access (OA) collections.

- Examining the free and Open Access targets in the shared instance: committee members examined 49 free/OA collections in the shared instance. Several were deactivated and errors were reported to ExLibris.

- SFX Usage Statistics: The committee studied SFX Usage Queries and developed a list of queries to be archived for post-migration access. Knox College's SFX data was used as the test case.

- Denise Green created a webpage with recommended ExLibris documentation and training videos related to link resolver functions in Alma/PrimoVE [https://www.carli.illinois.edu/products-services/products-services/link-resolver-sfx/alma_migration]. Committee members examined the draft and provided feedback.

- The committee held two open conference calls for SFX administrators: the first one in October was focused on Google Scholar library links while the second in January described the Autoloading process.

Why was this work important?   There are 38 CARLI SFX libraries planning to migrate to Alma/Primo, including three of the five Alma/PrimoVE Vanguard libraries. The committee's web page and recommendations assisted libraries in preparing for the Alma/Primo migration.

2019-2020 Link Resolvers Advisory Committee Project: Migration to Alma/Primo VE
In the current year, the renamed committee will continue advising CARLI staff on link resolver functions in Alma/PrimoVE. We may develop further documentation and training materials to assist all I-Share libraries.

2018-2019 CARLI SFX Systems Committee:
Stephanie Baker, Steve Brantley (part year), Katrina Bromann, Andrea Imre, Geoff Pettys (part year), Laurie Sauer, Erika Wade Smith (Chair), Lisa Wallis, Suzanne Wilson.
CARLI Staff Liaison: Denise Green.

2018–2019 and 2019-2020 CARLI Technical Services Committee Annual Projects

The 2018–2019 CARLI Technical Services Committee collaborated with the Collection Management Committee to sponsor a day-long forum on managing change, held at the University of Illinois at Chicago. The purpose of the forum entitled *Change is Good: You Go First!* was to address organizational change holistically in preparation for the I-Share members' upcoming migration from the Voyager ILS to Alma and Primo VE. The goals of the forum were to:

1. Introduce conceptual frameworks of change management applicable to many types of library work;
2. Provide tools to help individuals cope with change and to lead other staff members through major changes;
3. Present a variety of case studies illustrating how librarians and library staff have managed change.

The capacity-filled forum featured two keynote speakers who addressed change in both broad and specific ways. Kristine Hammerstrand, CARLI Director of User Services, explained upcoming changes with the I-Share migration to Alma and steps libraries can take now to help prepare. Guest speaker Kevin O'Connor, a Leadership and Communications Expert specializing in change, discussed how to lead change, what people need during change, and important personal transformations.

Afternoon breakout sessions were organized by the Technical Services, Collection Management, and Public Services Committees. The sessions focused on working with change in particular areas of specialization, including:

1. Managing a large, unplanned move of library collections and shelving;
2. Implementing new methods of collection development;
3. Project management tools;
4. The public services impact from system changes including New VuFind, Alma, and Primo;
5. The importance of personal change during organizational change from a therapist's viewpoint.

Over 80% of surveyed attendees thought that the forum was worthwhile and useful for their jobs. Survey respondents commented that the event was inspiring, motivating, refreshing, and positive. Slides, handouts, and other resources from *Change is Good: You Go First!* are available on the CARLI website: https://www.carli.illinois.edu/products-services/i-share/secure/change_is_good_you_go_first.

The 2019-2020 Technical Services Committee will complete three Alma related projects to help I-Share libraries who are actively preparing to migrate to Alma. These include:

1. Compile recommended Alma online tutorials for Technical Services staff;
2. Create a scaled-down Alma glossary;
3. Collect feedback from Technical Services members on future needs of best practices and recommended workflows.

A webpage will be created on the CARLI website to share the glossary and recommended tutorials.

The Committee also hopes to sponsor a future forum which will not only focus on developing skill sets, standards, and best practices for Technical Services staff working with Alma, but also work on defining Technical Services work as a whole. The Committee would like to work towards addressing how to quantify the value of Technical Services staff and justify staffing levels and faculty-level positions.