



CARLI 2019 ANNUAL MEETING
COMMITTEE AND TASK FORCE REPORTS



CREATED CONTENT COMMITTEE

MARLEE GRASER, SOUTHERN ILLINOIS UNIVERSITY EDWARDSVILLE

Promotion of Digital Collections

- Survey on use of social media to promote digital collections
- Promotion of digital collections on CARLI Facebook page via submission form

Linked Data Education

- Organized three-part webinar series on linked data
- Presented a high-level perspective on linked data, linked data in the library, and current linked data projects

2018-2019

Report of Planned
Activities and Projects

Promotion of Digital Collections

- Continue weekly promotion of CARLI digital collections through CARLI Facebook page
- Gather data to assess the impact and reach of posts

2019-2020

Report of Planned
Activities and Projects



Webinar Series and Workshop

- Organize webinar series on rights statements and copyright
 - December 3 (10:00-11:00 a.m.)
 - December 10 (10:00-11:00 a.m.)
 - December 17 (10:00-11:00 a.m.)
- Host in-person, hands-on workshop on tools for data cleaning and reconciliation in Spring 2020

2019-2020

Report of Planned Activities and Projects



Committee Members

Ellen Corrigan, Eastern Illinois University

Hunt Dunlap, Western Illinois University

Marlee Graser, Co-Chair, Southern Illinois University Edwardsville

Colin Koteles, College of DuPage

Tricia Lampron, Co-Chair, University of Illinois at Urbana-Champaign

Greer Martin, Loyola University Chicago

Ariana Potter, Pritzker Military Museum & Library

Matthew Short, Northern Illinois University

Angela Yon, Illinois State University

Board Liaison:

John Pollitz, Southern Illinois University Carbondale

CARLI Staff Liaisons:

Elizabeth Clarage and Amy Maroso

CARLI CREATED CONTENT COMMITTEE



PUBLIC SERVICES COMMITTEE
PREPARING TO WELCOME PRIMO VE

NESTOR OSORIO, NORTHERN ILLINOIS UNIVERSITY
AARON HARWIG, COLLEGE OF DUPAGE

Committee Members

- Krista Bowers Sharpe, Western Illinois University
- Aaron Harwig, co-chair, College of DuPage
- Chad Kahl, Illinois State University
- Nestor Osorio, co-chair, Northern Illinois University
- Katherine Sleyko, Prairie State College
- Elizabeth Sterner, Governors State University
- Reina Williams, Rush University
- Lesley Wolfgang, Saint John's College of Nursing
- Elizabeth Clarage, CARLI Staff Liaison
- Denise Green, CARLI Staff Liaison
- Spencer Brayton, Board Liaison, Waubensee Community College
- John Small, Board Liaison, North Central College

Focus Area 1

**Explore 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

Focus Area 2

Create 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

Focus Area 3

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.

Focus Area 4

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.

Focus Area 5

In-person training

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

Collaboration with the CARLI Instruction Committee

- Create user guides/tutorials/scripts on how to use the interface, depending on audience
- In-person training

Other Opportunities For Collaboration

- Based on evolution of Public Service Focus Areas
- Based on evolution of other CARLI Committee Projects





RESOURCE SHARING COMMITTEE
OUR FUTURE PLANS AND YEAR IN REVIEW

SARAH MCHONE-CHASE, NORTHERN ILLINOIS UNIVERSITY
MARCELLA NOWAK, COLLEGE OF DUPAGE

Committee Members (FY19 & FY20)

Belinda Cheek, North Central College, 2017-2020

Eric Edwards, Illinois State Library, 2016-2019

Kari Garman, Bradley University, 2018-2021

Rand Hartsell, University of Illinois at Urbana-Champaign, 2016-2019

Thomas Mantzakides, Morton College, 2016-2019

Shelley McDavid, Southern Illinois University Edwardsville, 2019-2022

Sarah McHone-Chase, Northern Illinois University, 2017-2020

Hilary Meyer, Triton College, 2019-2022

Marcella Nowak, College of DuPage, 2018-2020

Nathan Thebarger, Trinity International University, 2018-2021

Ashtin Trimble, Black Hawk College, 2018-2021

Erin Zimmerman, Heartland Community College, 2019-2022

CARLI Staff Liaisons: Debbie Campbell and Lorna Engels

- Universal Borrowing Standard Consortial Policies Review
https://www.carli.illinois.edu/sites/files/files/FY19_RSC_Project.pdf
- Survey responses and Voyager data analysis assisted Committee members in determining which updates to the Universal Borrowing Standard Policy to propose to the CARLI Board.
- 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.

The Committee is researching 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.**
- **Forgive 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.**
- **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.**

Thank you!

**Questions?
Comments?
Would your committee
like to collaborate with
ours?**

**Please contact
committee chairs
or CARLI staff
liaisons.**





TECHNICAL SERVICES COMMITTEE

GAYLE PORTER, CHICAGO STATE UNIVERSITY
MINGYAN LI, UNIVERSITY OF ILLINOIS AT CHICAGO



CARLI

Consortium of
Academic and Research
Libraries in Illinois

Ready to Venture?

Bon Voyage[r] to Alma and Primo VE:
Navigating Technical Services Trainings
and Discovering Best Practice Needs



CARLI

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Technical Services Committee

Co-Chairs:

Mingyan Li

Metadata Librarian, University of Illinois at Chicago

Gayle Porter

Catalog Librarian, Chicago State University

2019-2020 Committee Members

- ▶ Kathryn Dauksza, Illinois State Library
- ▶ Megan Kelly, Newberry Library
- ▶ Mingyan Li, University of Illinois at Chicago
- ▶ Robin Mize, University of Illinois at Springfield
- ▶ Deborah Morris, Roosevelt University
- ▶ Gayle Porter, Chicago State University
- ▶ Adrienne Radzvickas, Lincoln College
- ▶ Joan Schuitema, Illinois State University
- ▶ William Schultz, Eastern Illinois University



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Our CARLI Staff Liaisons

- ▶ Jen Masciadrelli
- ▶ Nicole Swanson
- ▶ with additional support from Ted Schwitzner and Jessica Gibson

THANK YOU

THREE ANNUAL PROJECTS:

*To Support Technical Services Staff
During Alma Migration*

Purpose:

- ▶ Facilitate TS staff training on Alma

ANNUAL PROJECT 1:

Compile Recommended Alma Online Tutorials for Technical Services Work

Purpose:

- ▶ Identify and list Alma tutorials to fill knowledge and skill gaps

ANNUAL PROJECT 2:

Create a Scaled-Down Alma Glossary

Purpose:

- ▶ Provide holistic, customized glossary for CARLI member libraries

ANNUAL PROJECT 3:

Compile Best Practices Needs and Recommended Workflows in Alma

Purpose:

- ▶ Collect Alma best practice needs
- ▶ Make recommendations for workflows in Alma

ANNUAL PROJECT:

Support Technical Services Staff During Alma Migration

Outcomes:

- ▶ New page on CARLI website **for TS staff use** with:
 - ▶ Glossary: scaled down and customized
 - ▶ List of recommended Alma tutorials
 - ▶ List of best practices needs based on TS staff input
 - ▶ Next step: recommended guidelines for workflow in Alma



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Feel free to reach out to the CARLI staff to report any additional recommendations for Alma Training for TS staff at support@carli.illinois.edu.



OPEN EDUCATIONAL RESOURCES TASK FORCE

ELIZABETH CLARAGE, CARLI



OPEN ILLINOIS:

OPEN EDUCATIONAL RESOURCES
TASK FORCE

CARLI Open Illinois: OER Task Force

- Loyola University Chicago - Annette Alvarado
- College of Lake County – Anne Chernaik
- Northern Illinois University – Kathy Ladell
- McHenry County College – Elizabeth Nelson
- DePaul University – Sue Shultz
- Illinois State University – Anne Shelley
- University of Illinois at Chicago – Janet Swatscheno
- University of Illinois at Urbana-Champaign – Sara Benson
- Western Illinois University – Linda Zellmer
- CARLI – Elizabeth Clarage and Lorna Engels

CARLI & Task Force Activities

- OER E-mail List
 - Join: <https://carli.illinois.edu/cgi-bin/mailman/listinfo/carli-oer>
- Open Illinois Initiative on CARLI Website
- Printables: OER Brochure / Finding & Adopting / OA vs. OER
- Webinars, Workshops, Presentations
- Other Activities
- Open Textbook Network & Library

CARLI Website – Open Illinois Initiative

https://www.carli.illinois.edu

NEWS JOBS EMAIL LISTS MEMBER DIRECTORY CONTACT

CARLI Consortium of Academic and Research Libraries in Illinois

PRODUCTS & SERVICES MEMBERSHIP EVENTS GOVERNANCE ABOUT

I-SHARE
Alma & Primo VE
Documentation
Liaison's Guide

DC DIGITAL COLLECTIONS (CONTENTDM)
Documentation
Search

SFX LINK RESOLVER (SFX)
Documentation

DELIVERY (ILDS)

E E-RESOURCES
CARLI-Managed Resources
Selection System

CM COLLECTIONS MANAGEMENT
Last Copy Program
Preservation Resources
Open Educational Resources

PS PUBLIC SERVICES
Instruction
Resource Sharing

CC CARLI COUNTS

Open Illinois Initiative

The CARLI Open Illinois Initiative is a commitment to facilitate members' use and support of Open Educational Resources (OER), especially training, advocacy, and coordination of cooperative effort for the benefit of CARLI libraries.

This site includes links to materials that may be helpful to CARLI members who are engaged in or plan to advocate for adoption of OER on their campuses. This site was developed in response to results from a → [survey distributed to member libraries in Fall 2017](#).

In 2017, CARLI became a → [consortial member of the Open Textbook Network](#) to support our members as they promote open textbooks and open resources at their institutions.

In addition to open educational resources, librarians and instructors can also advocate for library services, such as licensed resources or course reserves, to help improve affordability of course materials for students.

Materials on this site were compiled by members of the → [CARLI Open Educational Resources Task Force](#). It was updated October 2019.

Please use the right navigation bar to view the resources of this site.

Please send any comments, additions, or questions to [CARLI Staff](#).

SYSTEM STATUS
All Systems Active: All Systems Active

Overview

Background Readings

Train-the-Trainers Resources

Illinois Higher Education Data

Presentations

Getting Started Tools

Organizations

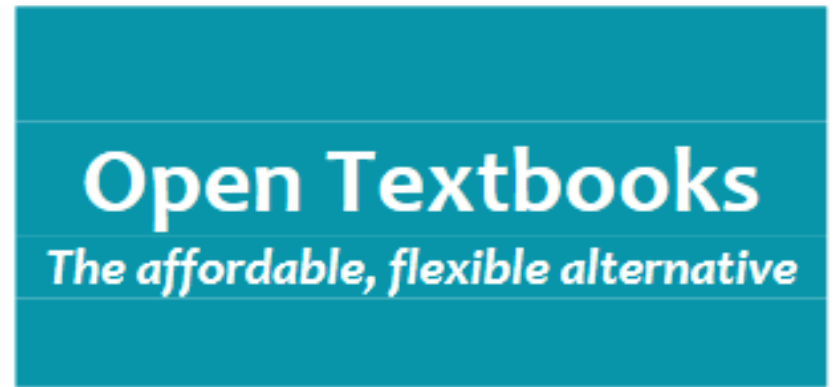
Professional Development

Sample OER Sites/OER LibGuides

<https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-overview>

Open Textbooks Pamphlet

- Available to print with CARLI information
- OR available to modify with local information
- On the CARLI Open Illinois website – in the Getting Started Toolkit



**Significantly reduce
student textbook costs**

**Benefit from flexible
and customizable
course material**



OTHER HANDOUTS

DIFFERENTIATING BETWEEN OPEN ACCESS and OPEN EDUCATIONAL RESOURCES

"Open data" generated from scholarly research are often released as "CCO," in which case the data qualifies as OER.

Scholarly books and articles may also qualify as OER, if released under a license which qualifies as OER.

How we (tend to) talk about Open Access and Open Educational Resources

RELATED TO TEACHING

Open Educational Resources
Codified knowledge useful for teaching, learning and stimulating discourse.

- Free public access. Customization always permitted.
- Formats: Videos, software, textbooks, assessment resources, teaching guides, images and figures, simulations...

RELATED TO RESEARCH

Open Access
Scholarly works primarily created to document new knowledge and advance the scholarly conversation.

- Free public access
- Formats: Scholarly books, scholarly journal articles

Open access materials can also be used for instruction in upper division courses.

OA and OER in Analog and Digital Environments

Analog environments

Open Educational Resources are always open access and online – except when they are in print or other analog formats.

For example: printed versions of open textbooks, 3D printed objects, etc.

Digital environments

Open Access items are always free to read. Unless printed, they are always online, and never require passwords, log-in credentials, payments, or access restrictions to read.

Open Educational Resources

Open Access

in terms of freedom

Abbreviation / License name / Icon	Brief description – official descriptions https://creativecommons.org/licenses	Permissions to
Public domain & CC0	U.S. Government works. Works published in the U.S. 95 or more years ago, or works clearly donated to the Public Domain.	Read, Reuse, Revise, Remix & Redistribute
CC BY* Creative Commons Attribution	Attribution required. Allows adaptation and redistribution. (the original open access license*)	Read, Reuse, Revise, Remix & Redistribute
CC BY SA Attribution-ShareAlike	Same as CC BY + any derivatives must have the same license.	Read, Reuse, Revise, Remix & Redistribute
CC BY NC Attribution-NonCommercial	Same as CC BY + no primary commercial use.	Read, Reuse, Revise, Remix & Redistribute
CC BY NC SA Attribution-NonCommercial-ShareAlike	Same as CC BY + no primary commercial use, + any derivatives must have the same license	Read, Reuse, Revise, Remix & Redistribute
CC BY ND Attribution-NoDerivatives	Attribution required. Only verbatim distribution allowed.	Read, Reuse, Revise, Remix & Redistribute
CC BY NC ND Attribution-NonCommercial-NoDerivatives	Attribution required. No primary commercial use. Only verbatim distribution allowed.	Read, Reuse, Revise, Remix & Redistribute
(c) Copyright (and free online)	In copyright. No open license. All rights reserved.	Read
Closed or Toll Access	(c) In Copyright and access restricted. All rights reserved is the automatic, default setting for any copyrightable works without an open license. Access-restricted content is available with payment of a fee or with log-in credentials.	Read

*Note: Creative Commons licenses are the most common, but not the only open licenses. Creative Commons licenses never expire! Fall '16.

Further information:
 *Attribution required on OER: <https://creativecommons.org/licenses/by/4.0/>
 Creative Commons: <https://creativecommons.org/licenses/by/4.0/>
 Public Domain: <https://www.govinfo.gov/epd/>
 Site address: <http://www.copyright.gov/licenses/>

Version 1.1
2019.10.14

OER Finding and Adopting Guide for Instructors: Worksheet

<p>1. Define your need:</p> <ol style="list-style-type: none"> Find selected open resources or replace a whole textbook? Keywords to search for topic, unit, or course Format or medium preference 	
<p>2. Search:</p> <ol style="list-style-type: none"> Try several different sites and different keywords and strategies Keep track of sites you've searched and keywords you've used Consult Table of Contents of a valued textbook for alternative terms 	<p>Talk with your liaison librarian. They have experience locating resources and are happy to assist you in finding materials.</p> <p>For repository lists see: OER Resources for Augustana College Faculty CARLI Open Illinois Initiative</p>
<p>3. Identify & Evaluate:</p> <ol style="list-style-type: none"> This stage is perhaps the most different from the process for selecting a traditional textbook. Use these criteria in your selection process: 	<p>Quality</p> <ul style="list-style-type: none"> Peer review available Reputation of author and/or institution Pedagogy <p>Appropriateness</p> <ul style="list-style-type: none"> Accuracy of content Alignment with course objective or learning outcome Appropriate reading level (see https://readable.io/text/) <p>Technical</p> <ul style="list-style-type: none"> Technical quality (clear visuals, high production value) Clear licensing declaration (Creative Commons or other)
<p>4. Adoption:</p> <ol style="list-style-type: none"> Who might you consult or inform of your choice to change materials? 	<p>Possible stakeholders or local experts:</p> <ul style="list-style-type: none"> Department head and faculty who teach the same course ITS if assistance is needed to load modules into Moodle Student Success Services in Learning Commons if there are questions about accessibility.
<p>5. Use:</p> <ol style="list-style-type: none"> How will students access this resource? 	<ul style="list-style-type: none"> Will you post materials to your own Moodle site? Do students need option to print sections on their own? Offered for sale as course pack in bookstore?

This worksheet developed by Kate Hess, Kirkwood Community College. Updated May 28, 2015 and licensed under a Creative Commons Attribution license. It has been modified by Connie Ghinazzi for use at Augustana College 9/14/2018.

Continuing Education

BUILDING AN OER WORKSHOP FOR YOUR
CAMPUS

PROMOTING OER ON YOUR CAMPUS:
BASICS AND BEST PRACTICES

IS THAT OER? MAKING SENSE OF THE CURRENT
TEXTBOOK AFFORDABILITY LANDSCAPE

IN-PERSON OER WORKSHOP at LOYOLA
UNIVERSITY CHICAGO

Other Task Force Activities

CARLI Program Planning Committee agreed to fund a portion of the costs for CARLI members accepted in the OTN Certificate in OER Librarianship Program 2020

The Task Force submitted a proposal for the ILA Public Policy Committee for inclusion in the Illinois Library Association 2020 legislative agenda.

Open Textbook Network



Open Textbook Library: Subjects

17 Accounting & Finance

78 Business

71 Computer Science & Information Systems

21 Economics

43 Education

29 Engineering

155 Humanities

21 Journalism, Media Studies & Communications

60 Law

101 Mathematics

12 Medicine

80 Natural Sciences

61 Social Sciences

16 Student Success

682 Total Books (a book may be included in multiple subject areas)

20 textbooks in development



**Open Textbook
Library**

Open Illinois Initiative & Task Force: What's Next?



Focus on training



Position CARLI to apply for grants



THANK YOU!

Open Illinois: Open Educational Resources Task Force



THANK YOU FOR ATTENDING!

