
**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