

**2021-2022 CARLI Technical Services Committee:
Annual Report of Activities**

Members:

Tammie Busch, Southern Illinois University Edwardsville
Jodi Craiglow, Trinity International University
Kathryn Dauksza, Illinois State Library, Co-Chair
Brent Eckert, Rock Valley College
Susan Howell, Southern Illinois University Carbondale
Megan Kelly, Newberry Library, Co-Chair
Robin Mize, University of Illinois at Springfield
Renata Schneider, DePaul University
Christa Strickler, Wheaton College

CARLI Board Liaison:

Taran Ley, Southern Illinois University School of Medicine

CARLI Staff Liaisons:

Jen Masciadrelli
Ted Schwitzner

2021-2022 Accomplishments:

- Shared Documentation Depository
 - <https://www.carli.illinois.edu/products-services/i-share/i-share-documentation/shared-documentation>
 - Building upon the work completed by the previous year's Committee to develop a site offering access to shared, locally created Alma documentation and workflows, the Technical Services Committee and CARLI staff sent requests for documentation to:
 - CARLI Technical Services Interest Group list serve via email
 - All CARLI members through the monthly newsletter

This year the Committee divided into two Subcommittees, one focusing on diversity, equity, and inclusion in authorities, and the other exploring best practices. In addition to the full Committee monthly meeting on the third Tuesday of each month, each Subcommittee met at least once a month to complete the work.

- **DEI Subcommittee**
 - The goal of the subcommittee was to explore solutions for two issues:
 - Changing the existing offensive subject headings display
 - Highlighting minority and underrepresented authors
- Changing existing offensive subject headings display: In a pilot project, CARLI identified and evaluated five different procedures successfully used by other institutions. The original

five procedures underwent testing in the Alma sandboxes. After the initial test, two options were identified that will require further assessment:

- Using display normalization and bib normalization rules together
 - Allows the preferred language to display using the display normalization (remove the display of objectionable headings in PrimoVE); Allows for searching of the preferred terms in the catalog.
- Using DEI Exclude and bib normalization rules together
 - Removes the objectionable terms from the display and adds the preferred terms to the database with the bib normalization (the terms will display and be searchable in PrimoVE). This option also changes CDI and Community Zone records.
- Both options have positive impacts changing display and searchability of terms in PrimoVE. However, a few questions remain regarding facet display, the impacts of system updates, and how the options function in the Network Zone. Further testing is needed to understand possible application at the consortium level and how implementation/maintenance would be managed.
- Highlighting minority and underrepresented authors: This approach emphasizes attribution & authorship categories (i.e. Assyrians, Pulitzer Prize winners, Naturalists, etc.). As implementation requires using MARC field 386 that does not currently display in Primo VE, the issue was referred to CARLI Primo VE task force to investigate possible display activation. The field, once active, would need to be populated with the Library of Congress Demographic Group Terms (LCDGT), and possibly, other vocabularies.
- Both goals require further assessment and detailed implementation strategies, and it is recommended that the subcommittee continue its work in the future, possibly becoming an advisory group.
- **Best Practices Subcommittee**
 - Documentation: Per CARLI's suggestion, the subcommittee reviewed, updated, and combined two CARLI cataloging documents, "Standards for Bibliographic Records in I-Share" and "Cooperative Cataloging Guidelines for I-Share," into a single best practices draft document to be reviewed by the larger TSC committee and eventually sent to the Board for approval.
 - Survey: The subcommittee composed a 13-question survey to learn about the comfort level of I-Share libraries' members with the Connexion cataloging tool and with their process of finding, editing, and creating bibliographic records. This information will be used to better inform the work of the larger Technical Services Committee and to design and offer training opportunities. The survey was released in March and has received 73 responses.

Future Plans:

The Technical Services Committee will continue meeting in FY23. The research and deliberation for the two current Technical Services Subcommittees will also move forward. The DEI Subcommittee will continue to monitor, identify and evaluate subject heading vocabulary updates and bib normalization procedures to recommend for future implementation by the CARLI membership. The Best Practices Subcommittee will complete and publish the "TSC Best Practices"

document. The full Technical Services Committee will evaluate the data from the 13 question survey to further guide the Committee best practices, projects and training.

Members of the Technical Services Committee express their continued gratitude for the work and support the CARLI staff provide in guiding and implementing the ideas put forward through the committee's research findings.

2021-2022 CARLI Technical Services Committee Annual Project: Shared Documentation Depository

<https://www.carli.illinois.edu/products-services/i-share/i-share-documentation/shared-documentation>

Shared Documentation Depository

Why reinvent the wheel? Projects are easier to begin with inspiration. It is easier to craft documentation from examples than to begin from scratch, and a depository is only as useful as its submissions.

This depository contains documentation submitted by CARLI member libraries, for the benefit of the broader community.

ABOUT THE DOCUMENTATION

Each document is noted with the topic, the name of the institution by whom it was submitted, the date it was added to the depository, the date the link was last checked for availability, and any notes.

Example:

Topic	Author	Date Added	Date Last Checked	Notes	Link
Work orders	CARLI Office	7/14/2021	8/1/2021	This document is for larger institutions that might have multiple service departments	How to: Using Work Orders in Alma

The documentation is not peer-reviewed; it is up to those using the documentation to determine whether the information is still valid, accurate, and of use for their purpose.

HOW TO SUBMIT

Do you have documentation to share? Please do!

New categories and subcategories will be added to this page as documentation is received.

Sample topics of documentation we'd love you to submit:

- Library privacy policy
- Library interlibrary loan policy
- Annual reports (internal for the library and/or external to stakeholders)
- Newsletters
- Library marketing and promotional materials
- Event descriptions
- Form templates
- Workflow visualizations
- Video tutorials
- How-to guides, such as how to use the OPAC, search databases, log in to services, find the library, etc.
- Other topics of interest

You can submit items for sharing [via this Smartsheet form](#). Before submitting, please make sure that you have appropriate permissions to share.

- To date, 57 documents have been submitted and published, covering nine different topic areas including:
 - Acquisitions
 - Analytics
 - Cataloging
 - eResources
 - Fulfillment
 - General
 - Primo VE
 - SIS
 - Users

***2021-2022 CARLI Technical Services Committee Annual Project:
Cataloging Survey***

1. Do you/any of your library's catalogers use OCLC Connexion/OCLC WorldShare Manage?
 - Yes
 - No
2. How often do you/your catalogers use Connexion/WorldShare Manage in your routine cataloging tasks?
 - Daily
 - A few times a week
 - A few times a month
 - Only sporadically
 - Never
3. Where do you/your catalogers look for new (non-NZ) bibliographic records for **print resources**?
 - Connexion/WorldShare Manager
 - Z39.50 searching (including "Search External Resources" in Alma)
 - Vendor-supplied records
 - Other
4. Please indicate sources for "Other" indicated in Question 3.
5. Where do you/your catalogers look for new (non-NZ) bibliographic records for **electronic resources**? (Please Rank in order of preference).
 - Alma CZ
 - Connexion/WorldShare
 - Vendor-supplied records
 - Other
6. Please indicate sources for "Other" indicated in Question 5.
7. Where do you start your search for bib records?
 - Alma Network Zone
 - Connexion/WorldShare
 - Vendor-supplied records

- Other (please specify)
8. Where do you/your catalogers create new bibliographic record (when creating from scratch)?
 - Alma
 - Connexion/WorldShare
 - Somewhere else
 - My library doesn't create new bib records
 9. How would you rate your/your catalogers' comfort level with using Connexion/WorldShare?
 - Very comfortable
 - Somewhat comfortable
 - Neutral
 - Somewhat uncomfortable
 - Very uncomfortable
 10. If Connexion training opportunities were offered, would you be interest in participating?
 - Very interested
 - Somewhat interested
 - Neutral
 - Somewhat interested
 - Very interested
 11. Other comments:
 12. Name (optional):
 13. Please select your I-Share Institution (optional):

Technical Service Cataloging Survey Results Summary

73 responses total

- 66 responses on the first day the survey was available
- 22 respondents included their name
- 54 respondents included their institution
 - 40 institutions
 - 6 institutions with 2 responses; 1 institution each with 3, 4, and 5 responses.
 - 19 respondents skipped the question
- 69 of 73 respondents use Connexion or WorldShare Metadata in their work
 - Daily: 37 (51.4%)
 - Few times/week: 20 (27.8%)
 - Few times/month: 9 (12.5%)
 - Sporadically: 2 (2.8%)
 - Never: 4 (5.5%)
 - One skipped the frequency question
- OCLC (Connexion/WorldShare) ranked as top source for print records
 - 58 ranked as #1, 12 ranked as #2 or #3 (6 respondents each)
 - Second ranked source is Alma's "Search External Records" function for Z39.50 searches.
 - Close third is vendor records

- Other is fourth but covers a lot of territory
 - Outsourcing copy cataloging: Backstage, Marcive
 - GPO for gov docs
 - temporary/brief records
 - "Community zone"
- Alma Community Zone ranked as the top source for electronic records
 - 38 ranked as #1, 19 ranked as #2
 - OCLC ranked second via the ranking score
 - 27 ranked OCLC #1
 - 23 ranked OCLC #2
 - 16 ranked OCLC #3
 - Other is fourth again
 - People used the Other box as a general comment, rather than elaborating much on sources.
- Catalogers predominantly start their search in the Alma NZ
 - 54 of 73 (74%) specified NZ
 - 17 of 73 (23.3%) specified OCLC as first search location
 - 2 responses (2.7%) answered Other. Both responses indicate that workflow dictates where they search.
 - If there is an existing brief record, then they continue in OCLC.
 - P vs E
 - Standalone E title vs. E title in collection
 - 0 responses for vendors as the starting point for cataloging
 - Maybe infer that catalogers responding saw acq vendors as a different process
 - Possible future questions here on likelihood to use vendor records
- Catalogers predominantly create new records in OCLC (3 skipped this question)
 - 50 of 70 responses (71.43%) specified OCLC
 - 12 of 70 (17.14%) specified Alma
 - We didn't ask about reasons why this might be. Possible future questions here.
 - 8 of 70 (11.43%) don't create new bib records
- Most respondents are comfortable with cataloging in OCLC tools
 - 47 of 73 (64.4%) ranked very comfortable
 - 17 of 73 (23.3%) ranked somewhat comfortable
 - 6 of 73 (8.2%) neutral
 - 3 of 73 (4.1%) somewhat or very uncomfortable
- Most respondents are interested in participating, or at least supportive of seeing training on OCLC tools in the Alma context
 - 57 of 73 (29-very, 28-somewhat) interested in participating
 - 13 of 73 neutral on training
 - Some of those responding neutral are somewhat or very comfortable with OCLC. Comments indicate that catalogers have been using OCLC for years, but recognize that there may be things they don't know or underuse.
 - Some of those who are neutral on OCLC training are also neutral or uncomfortable with OCLC.