

**CARLI Collection Management Committee:
FY 2024 Annual Report of Activities and Projects**

Members

Janice Derr, Co-chair	2021-2024	Eastern Illinois University
Jeannette Glover	2022-2025	Spoon River College
Gwen Gregory	2022-2023	Northern Illinois University
Carl Lehnen	2022-2025	University of Illinois Chicago
Jayna Leipart Guttilla	2021-2024	Illinois Valley Community College
Briana Love	2023-2026	Aurora University
Jackie Mann	2023-2026	Loyola University Chicago, DePaul University, as of 5/2024
Kris Veldheer	2021-2024	Catholic Theological Union
Erin Zimmerman, Co-chair	2022-2025	Heartland Community College

CARLI Staff Liaisons: Elizabeth Clarage, Jennifer Masciadrelli

Meetings

The committee met regularly, generally once each month, and all meetings were conducted via Zoom. After discussing several topics including inclusive collection development plans, ebook promotion and utilization, and weeding. This year, the committee's work focused primarily on weeding.

Weeding

Two major projects were identified: hosting a webinar and creating a webpage for the CARLI website. A call was sent out to invite participants for the webinar, and due to a large response, the subcommittee hosted a three-part online discussion series, "Weeding and Shifting Series: Panel Presentations and Discussions." Sessions were held on May 10, May 31, and June 7 from 11:00-12:00. Committee members, Carl Lehnen, Kris Veldheer, and Janice Derr served as moderators, and Briana Love and Jackie Mann served as chat monitors.

The committee thanks the 14 presenters from 13 CARLI members that shared their weeding and / or shifting projects during these sessions:

- Catholic Theological Union: Kris Veldheer
- Dominican University: Allison Lietz
- Eureka College: Kelly Fisher
- Field Museum of Natural History: Melissa Anderson
- Eastern Illinois University: Stacey Knight-Davis
- Eastern Illinois University: Bill Schultz
- Harper College: Melissa Merlos
- Kankakee Community College: Tracy Conner
- Illinois State Library: Ryan Franklin
- Illinois State University: Chad Kahl
- Morton College: Guillermo Gasca
- Northeastern Illinois University: Christopher Straughn
- Northern Illinois University: Kate Hartman
- Oakton College: Gretchen Schneider

The sessions were well received, with 368 registered for the three sessions. The programs were opened up to the Professional Development Alliance consortia members and 93 registrants were from these non-CARLI institutions. During the course of the sessions, some topics discussed were making space for other units, working with technical services, communicating with stakeholders, project management, and working with vendors.

After the webinars, the committee discussed how to use the information gathered from panelists and attendees to create a webpage designed to provide guidance on conducting a major weeding project. Suggested topics include getting started, weeding criteria policies and workflows, removing and disposing of discarded materials, and using related Alma reports. The committee plans to continue work on the webpage next year.

Additional possible future tasks

The committee will continue work on a weeding webpage for the CARLI website. Discussion of other future projects is ongoing.

CARLI Commercial Products Committee FY 2024 Annual Report of Activities and Projects

Members

Chad Buckley	2023-2026	Illinois State University
Jessica Harris	2021-2024	University of Chicago
Michele Hunt, Co-Chair	2021-2024	Northern Illinois University
Sarah Johnson	2021-2024	Eastern Illinois University
Ann Johnston	2023-2026	Olivet Nazarene University
Marie Martino, Co-Chair	2022-2025	Moraine Valley Community College
Thane Montaner	2022-2025	Prairie State College
Scott Thomson	2022-2025	Rush University
Ashtin Trimble	2023-2026	Black Hawk College

CARLI Staff Liaisons: Jenny Taylor, Nicole Ream-Sotomayor

Activity Highlights

Electronic Resource Proposals

The CPC received 5 vendor proposals in FY24. After review by the committee, 1 proposal for Mometrix was accepted.

Additional Activities

In addition to the committee's regular work of discussing vendor proposals, the committee spent time focused on reviewing the processes of CARLI's e-resources brokering program. This included discussion and feedback on CARLI's E-Resources Brokering Program Values document (<https://www.carli.illinois.edu/sites/files/e-resources/CARLI%20Brokering%20Values.pdf>). The Values document is geared toward vendors interested in working with CARLI, and it lays out the proposal and review process, an overview of brokering program logistics, and a statement of CARLI's values. This document was reviewed and endorsed by CARLI's Governance Board at their December 8, 2023 meeting, and is now available on CARLI's e-resources website. The document is also shared directly with vendors in response to inquiries and proposals.

The committee also discussed various ways to gather vendor feedback from the larger CARLI membership. While the committee is tasked with reviewing vendor proposals and making advisory recommendations to CARLI staff, the committee would like to solicit broader input from CARLI libraries. The committee decided to design a survey, which will be distributed to CARLI's E-Resource Contact list on an annual basis (see Attachment 1). The survey will ask about vendors and products libraries are interested in, subject areas they are looking to grow, and the library's current budget situation and acquisitions process. The hope is that the results of the survey will provide the committee with information to better inform the review of vendor proposals and their recommendations to CARLI. The first iteration of the survey will be distributed July 15 – August 31, 2024.

Attachment 1 CARLI E-Resource Interest Survey 2024

Thanks for your willingness to participate in the CARLI Commercial Product Committee (CPC) E-Resource Interest Survey. The CPC and CARLI staff work together to "encourage cooperation and collaboration in identifying, evaluating, and recommending the purchase and/or brokering of electronic information resources."

The CPC and CARLI staff will use the results from this survey to help guide decisions related to committee projects, the pursuit of content, and to best serve CARLI's members. An anonymized summary may be posted on the CARLI website.

Please answer the questions as best as you are able. If you have any questions, please contact: support@carli.illinois.edu.

1. Your library type:
 - a. 2-year public
 - b. 4-year public
 - c. 4-year private
 - d. Other
2. With which CARLI member institution are you affiliated?
3. What best describes your acquisitions budget for the current fiscal year?
 - a. Budget is increased over last year
 - b. Budget is flat (no increase or decrease)
 - c. Budget is decreased from last year
 - d. Unsure
 - e. Other
4. Which of the following options best explains your acquisitions process?
 - a. We can acquire new one-time purchases, but we must cancel a subscription in order to acquire a new continuing resource.
 - b. We can acquire both one-time purchases and subscriptions without needing to cancel current subscriptions.
 - c. We can neither acquire one-time purchases or ongoing subscriptions due to budget constraints.
 - d. Other
5. What subject area(s) is your library looking to grow e-collections in?
6. What vendors are your library interested in?

For example, some vendors that have approached CARLI or that CARLI members have asked about include: APA, DeGruyter, Docuseek, Filmocracy, Hein, History Makers, IBIS World, Mary Ann Liebert, MIT Press, NewsBank, Nkoda, Third Iron, Visible Body, etc.
7. Are there specific products or types of e-content that your library is looking to replace, fill in gaps for, or find alternative ways to access content?

For example, alternative ways to access the Wall Street Journal or current newspaper content

8. Would your library be interested in participating in a centralized, product-trial initiative (such as the former Try-It Illinois program)?
 - a. Yes
 - b. No
9. Which types of Open Access (OA) initiatives is your library interested in? Please check all that apply. (Definitions/descriptions will be provided)
 - a. Read and publish agreements
 - b. Subscribe to Open
 - c. Ebook initiatives
 - d. Contributions to OA initiatives
 - e. OA services (examples: SciFree, OA Switchboard, etc.)
 - f. Our library is not interested at this time
 - g. Other
10. Are there any vendors you'd like CARLI to work with regarding open access initiatives and/or transformative agreements?
11. Are there any resource or material types you would like more options for? Please check all that apply.
 - a. Newspapers
 - b. Magazines
 - c. Ebooks
 - d. Journals
 - e. Legal resources
 - f. Pay-per-article
 - g. Streaming video
 - h. Primary source collections
 - i. Music recordings/scores
 - j. Data sets
 - k. Images
 - l. Other
12. What are your library's preferred authentication system(s)? Please check any that apply.
 - a. OpenAthens
 - b. EZproxy
 - c. Shibboleth/SAML
 - d. IP address recognition
 - e. Individual login
 - f. Other
13. What is your biggest e-resource challenge aside from staffing and budget?
14. Is there anything else related to e-resources that you wish for CARLI to know?

CARLI Discovery Primo VE Committee FY24 Annual Report

Summary report of the work of the Discovery Primo VE Committee (DPVC) during the period July 1, 2023 – June 30, 2024.

Committee members:

- Andrew Belongea (Columbia College Chicago), 2022-2024
- Allan Berry (University of Illinois at Chicago), 2022-2024
- Marlee Graser (Southern Illinois University Edwardsville), 2022-2025 (resigned Feb. 2024)
- Colin Koteles (College of DuPage), 2022-2025, Chair
- Matthew Short (Northern Illinois University), 2022-2025
- Lindsey Skaggs (Illinois State University), 2022-2026
- Laura Spradlin (Illinois Wesleyan University), 2023-2026 (resigning June 30, 2024)
- Nathan Theborge (Trinity International University), 2023-2026
- Aimee Walker (Joliet Junior College), 2022-2024
- CARLI Staff Liaisons: Jessica Gibson, Amy Maroso

Overview

The Discovery Primo VE Committee works with the CARLI staff and members to optimize the discoverability of materials in Primo VE through efficient and cost-effective best practices, documentation, and programs. The committee will promote a user-focused approach and encourage cooperation and collaboration in matters related to individual library and consortial discovery of resources, usability, and accessibility. The Discovery Primo VE Committee will collaborate with other CARLI committees and groups to discuss issues of common interest, to facilitate joint program planning, and to advocate for enhancements to the Primo VE software platform.

In the second year of the committee, committee members focused on creating and delivering training and instruction resources including webinars, presentations and online resources that demonstrate and discuss Primo VE functionality and integrations that improve findability and access to specific library items and collections which will lead to more use and awareness of these resources. Resource topics were chosen for their broad appeal and usefulness to CARLI libraries.

Concurrently, committee subgroups completed focused work improving the quality of Network Zone (NZ) metadata as well as promoting CARLI-member input on Ex Libris enhancement requests. These groups focused specifically on Dedup/FRBR configuration, local fields

management, local resource types evaluation and creation, and Ex Libris Idea Exchange input. The work of each subgroup was generally completed by one or two committee members.

To facilitate our work, the full committee met for two hours monthly via Zoom. A committee email list was used for communication outside of meetings.

Webinars and Training

October 12, 2023 I-Share Alma Primo VE Office Hours

Colin Koteles and Lindsey Skaggs presented on the Springshare LibGuides A-Z List integration into Primo VE. They shared why they decided to enable the integration at each of their institutions, the pros/cons of the integration, and demonstrated how to implement it. Detailed [instructions](#) were made available to all participants and remain on the CARLI site.

Discovering Collection Discovery Webinar

The committee hosted a [webinar](#) on creating Collection Discovery collections in Alma and displaying them in Primo VE on December 12, 2023. Andrew Belongea, Lindsey Skaggs, and Laura Spradlin presented on how to activate the feature, troubleshoot indexing bugs, and the use cases at their institutions. Other committee members provided input on their experiences with the feature. At the end, attendees were encouraged to vote for the “Alma collections: Allow to add from network zone” idea in the Idea Exchange, which would enhance this feature for consortia.

Connecting to Your Best Stuff: Elevating Resources in Primo VE

The committee will host a webinar on June 11, 2024 that demonstrates techniques for surfacing specific items or sets of items in search results for easier discovery and access to items that are expected to be ranked highly in certain searches. Committee members Andrew Belongea, Colin Koteles, and Laura Spradlin will discuss several different Primo VE features: Resource Recommender, Search Ranking, and the new Primo Showcase. The speakers will demonstrate and discuss how these tools can help highlight collection holdings and other library resources.

Subgroup Work

Dedup/FRBR

In January 2024, research and configuration testing that this group began in FY23 culminated in CARLI staff running a job to prevent over 17,000 NZ records for versions of the Bible from being combined by Primo VE’s dedup and FRBR processes due to having similar MARC 130 uniform title fields. I-Share libraries report that the result has been a better search and discovery experience for users looking for a particular version of the Bible. In future, the committee may

investigate how to apply similar techniques to other titles experiencing similar discovery challenges, such as works of music, classics, law titles, etc.

Local Fields

This group continued testing of a consortial set of local fields from the NZ and has been investigating a new source of potential fields for distribution from other Alma consortia's documentation. The first phase of fields should be distributed this summer after the current cohort of new I-Share libraries has gone live in Alma in our shared network environment.

Local Resource Types

The local resources subgroup is making steady progress on implementing new audio and visual resource types within our consortium's Network Zone (NZ). The proposed resource type definitions and configurations have been successfully deployed and tested in a sandbox NZ environment. Indication rules were developed to find bibliographic records for audio and visual items that are miscataloged or incompletely cataloged. These rules located thousands of bibliographic records in our NZ that require cleanup to their fixed fields in order to accurately reflect the new resource types. Through CARLI's relationship with the Illinois Heartland Library System's Cataloging Maintenance Center, catalogers are now working on correcting audio item records in anticipation of the new audio resource definitions being implemented sometime this summer. Cleanup work for audio resource types is scheduled to be completed by the end of June.

Idea Exchange Feedback Coordination

The committee has been investigating means to pool influence toward encouraging Ex Libris to develop features important for consortia like CARLI. To this end, we have isolated a set of key topics on the Ex Libris "Idea Exchange" (<https://ideas.exlibrisgroup.com>) and are encouraging our members to vote on these topics.

Future Plans

- Create learning opportunities (online training, web resources, etc.) demonstrating how Primo Analytics can be used to improve Primo VE user experience and item discoverability.
- Provide CARLI membership with enhanced guidance for the customization and configuration of Primo VE. This could include a combination of discussion, documentation, and advocacy.

CARLI E-Resources Management Committee FY 2024 Annual Report

Members:

Robin Hofstetter	2023-2026	Roosevelt University
Elizabeth Hollendonner	2022-2024	Millikin University
Andrea Imre	2022-2024	Southern Illinois University Carbondale
Elizabeth Nelson	2022-2025	McHenry County College
Jennifer Patterson	2023-2026	Elmhurst University
Sara Rizzo	2022-2025	National Louis University
Megan Ruenz	2022-2024	Wheaton College
Lisa Wallis	2022-2025	Northeastern Illinois University

CARLI Staff Liaisons:

Denise Green, Marisa Tolbert

Charge: The E-Resources Management Committee will advise on the whole life cycle of electronic resources from acquisitions and cataloging, to selecting how/what to add to Alma/PVE, activating, proxy issues, OpenAthens authentication, gathering usage statistics to help libraries know what and how material is being used, to deactivation/deaccession.

Meetings: The committee, demonstrating its flexibility and commitment, met monthly on Zoom on varying days and times based on members' availability.

Activity Highlights:

1. OCLC WorldShare Collection Manager and Alma – The bulk of the committee work this year focused on the relationship between OCLC holdings using WorldShare Collection Manager and Alma Electronic Resources Management. WorldShare Collection Manager is a tool that allows libraries to connect users with electronic content, but the holdings can sometimes get out of sync, and libraries find requests for items they do not own. OCLC Data Sync allows for the synchronization of location holdings. The committee worked to identify problem areas and ensure libraries understand the relationships between the OCLC products and Alma. Ted Schwitzner and Denise Green led a presentation illustrating the relationships between Alma and OCLC Data Sync. This presentation included managing errors in the sync based on records in the Alma Community Zone (CZ) that don't always have OCLC numbers or mismatches, where reports can be found in Alma, how to turn off holdings in OCLC WorldShare Collection Manager, and reclamation projects. Millikin University and Northeastern Illinois signed up for case studies for OCLC Data Sync. Denise Green and colleagues at CARLI are working on documentation for the CARLI site, including a concept map of the relationships between OCLC products and Alma.
2. EBSCOhost User Interface 2024 and EBSCOhost Experience Manager – CARLI hosted multiple web demos, as all libraries are encouraged to migrate to the new interface in the summer of 2024. Feedback to EBSCO included concerns about multiple clicks, questions

about any necessary authentication changes, and the possibility of screen reader trouble. By the May 2024 committee meeting, three-member institutions from ERMCM had made the switch without complications. The largest hurdles are adjusting to the new interface and updating documentation.

3. I-Share display logic rules for Alma Network Zone (NZ): Standardizing NZ display logic for Primo to reduce and prioritize resources was explored and discussed. ExLibris documentation states that NZ display logic rules override Institution Zone (IZ) display logic if the institution has the same collection active in both zones. This discussion is ongoing and no current changes were made as some member institutions have complicated display logic. The full description of electronic collections managed by CARLI and the support of the NZ is documented on the CARLI site.
https://www.carli.illinois.edu/i-share/electronic-res-man/carli_nz_collections

Future Plans:

1. The committee is invested in monitoring news about upcoming browser changes and authentication and how to get ahead of the changes to assist libraries with any necessary transition. Due to privacy settings in browsers such as Google Chrome, this could impact all libraries using IP authentication with hide IP feature, removing link decoration, and third-party cookie tracking.
2. The OCLC WorldShare Collection Manager and Alma are still evolving, and the CARLI site documentation is in the works.
3. Hosting a webinar on adding license information to Alma was discussed early on in the FY24 year but didn't gain traction. However, it could potentially be a topic for the committee's future.

Acknowledgments:

We thank the members, including Elizabeth Hollendonner, Andrea Imre, and Megan Ruenz, for completing their terms this year. Elizabeth Nelson and Jennifer Patterson will step up as Co-Chairs for FY25. We express continued thanks to CARLI for the support through this committee.

Respectfully submitted by the E-Resources Management Committee, May 2024.

2023- 2024 CARLI Instruction Committee Annual Report of Activities

Members:

Alex Deeke, 2022-2025, University of Illinois Urbana-Champaign, co-chair

Guillermo Gasca, 2022-2025, Morton College

Heather Koopmans, 2021-2024, Illinois State University

Abigail Mann, 2023-2026, Illinois Wesleyan University, co-chair

Claire Reinert, 2022-2025, McKendree University

Firouzeh Rismiller, 2021-2024, DePaul University

Zohra Saulat, 2023-2026, Lake Forest College

Stacey Shah, 2023-2026, Elgin Community College

Rebecca Starkey, 2022-2024, University of Chicago

CARLI Staff Liaisons:

Debbie Campbell

Denise Green

Charge:

The committee will identify and address issues of critical concern and best practices for instruction librarians and information literacy programs. The Instruction Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, inclusion, and equity (DEI), and will ensure that CARLI's commitment to diversity, equity, and inclusion is embedded in their work.

Meetings:

All meetings were held by video conference and took place on the fourth Thursday at 1:00 p.m. with some exceptions. The committee also used the instruction@carli.illinois.edu mailing list and a Google Drive folder to communicate outside of meeting times and share information and documents.

Theme and summary for the year:

The committee's theme this year was New Directions/New Users. As a committee, we agreed that while the focus on recovery over the last few years has been needed, we, and, we believed, others, were ready to look forward. In discussion, we identified a number of possible directions that all grouped under the umbrella "New Directions/ New Users." Most prominent amongst those were pre-professional and life-long learning skills, and relationship building with non-traditional students and co-workers. In discussing "new" concerns, we also noted that elements focused on addressing AI and LLMs, non-traditional students and JEDI issues could be incorporated in all programming around this theme, so we made it a point to include a discussion question addressing each of these facets in our programming.

Much of the Instruction Committee's programming this year was discussion-based, providing opportunities for the CARLI membership to meet colleagues, share experiences, and ask questions. Three of these meetings revolved around the examination of recent publications and professional resources, providing entry points to in-depth dialogue. In order to encourage open conversation, these events were not recorded; however, our moderators sought to summarize points and ideas in the chat, and we encouraged participants to add their thoughts: these chats were shared with participants after the events.

In the latter half of the spring, we focused our attention on reviving an in-person instruction-related event. This focus was partly in response to mixed feedback from the previous year's evaluation of the instruction showcase: while many respondents praised the convenience of the online format and being able to attend focused discussions, others noted that they appreciated the concept of the open discussion section we included and wanted more such opportunities: we also noted that during our online discussion events, conversation flowed most freely when discussing various experiences and ideas (rather than the article that was selected as a topic starter). Thus we held a day-long community building event at Elgin Community College: we prepared a set of guiding questions and prompts around the idea of new users and directions, but were primarily interested in creating an environment in which CARLI colleagues could get to know each other better and exchange ideas and strategies. We had a good response from Chicago-area and community-college members, and have discussed continuing with such events across the state.

Our fifth and final event was the 12th annual CARLI Instruction Showcase, held virtually on June 18, 2024. In keeping with past Showcases, it provided a platform for CARLI librarians to share practical approaches to instruction with their peers. Following a keynote presentation on student belonging from María Evelia Emerson, there were eight presentations, grouped into 4 sessions: "Inviting Students into the Process"; "Navigating New Approaches," "Collaborating Across Campus," and a workshop, "Researching the Library Itself: Library Collaboration with Interior Design." We asked for proposals in three areas—New Directions in Technology, Lesson Plans for New Users, Case studies of New Collaborations— and received several for each area, which we then grouped by focus. We also offered users a choice of a variety of formats—lightning talk, 20 minute presentation, or a 20 minute presentation and 20 minute workshop—thinking that some people might be more willing to present with a shorter or less formal format. Because the majority selected a 20 minute presentation, we asked the one lightning talk only format to consider a longer presentation, which they did. After the event, the Committee will circulate a feedback form to collect input to guide future themes and event planning: the 2023 feedback was a helpful tool for this year's committee.

Overall, this has been a productive and successful year and we wish to acknowledge the hard work of all the Committee members and of the CARLI staff liaisons who helped make it possible!

Instruction Committee Events:

Workplace Information Literacy: Article Discussion

- Date and time: Monday, 10/30, 1:30 p.m.- 2:30 p.m.
- Location: Virtual through Zoom
- Attendance: 17 people registered for this event and up to 13 people logged in.
- Description: **New Directions and New Users**: CARLI Instruction's theme for this year reflects the reality of changing student populations and the diversity of institutions that make up CARLI. Our first event of the year will focus on workplace information literacy: how do we encourage students from all programs to see research as something that extends past a specific assignment and into the demands of their future career?
- Join us for a virtual discussion of these questions. To facilitate the conversation, we will use "From College to Career Success" (Rose, Tara A. and Terri L. Flatebey) from the July 14 2022 issue of Inside Higher Ed as a starting place.
- [Associated Article](#)
- Moderated by Abby Mann and Claire Reinert

Virtual Discussion on Building Faculty and Staff Relationships

- Date And Time: Thursday, December 7, 1:00- 2:00 p.m.
- Location: Virtual through Zoom
- Attendance: 49 people registered for this event and up to 30 people logged in.
- Description: Following this year's theme of **New Directions and New Users**, the CARLI Instruction committee invites you to a series of discussions on building relationships with external stakeholders. The first virtual discussion will focus on new conceptualizations, approaches, and methods to building relationships with faculty and staff. To facilitate our conversation on this topic, we will use Ellen Hampton Filgo and Sha Towers' article "An Analysis of Relationship-Building in Liaison Work: Defining the Importance of 'Hangout Activity'" (from The Journal of Creative Library Practice, March 2020) as a starting point. Participants are encouraged to read the article ahead of time (but all are welcome to join regardless!). This will be an interactive discussion among participants, and an opportunity to reflect on how we develop relationships with faculty and staff outside of the library in our work
- [Associated article](#)
- Moderated by Heather Koopmans and Alex Deeke

Virtual Discussion on Building Relationships with Students

- Date And Time: Wednesday, January 31st, 2:00- 3:00 p.m.
- Location: Virtual through Zoom
- Attendance: 54 people registered for this event and up to 30 people logged in.
- Description: Following this year's theme of New Directions and New Users, the CARLI Instruction committee invites you to a series of discussions on building relationships with external stakeholders. The second virtual discussion will focus on new conceptualizations, approaches, and methods to building relationships with students through research consultations. To facilitate our conversation on this topic, we will use Symphony Bruce's article "Teaching with Care: A Relational Approach to Individual Research Consultations" (from *In the Library with the Lead Pipe*, Feb. 2020) as a starting point. Participants are encouraged to read the article ahead of time (but all are welcome to join regardless!). This will be an interactive discussion among participants, and an opportunity to reflect on how we develop relationships with students in our work.
- [Associated Article](#)
- Moderated by Claire Reinert and Zohra Saulat

CARLI Community Building: Sharing Strategies for Instruction

- Date And Time: Thursday, April 25, 10:30a.m.- 2:30 p.m.
- Location: Elgin Community College Library
- Attendance: 21 people registered for this event and 16 participated.
- Description: Come join colleagues from across Illinois to talk about library instruction! The CARLI Instruction Committee is pleased to announce our first "CARLI Community Building: Sharing Strategies for Instruction" event where you can meet other librarians, grab lunch, and talk about topics in library instruction. The event is being hosted in-person at Elgin Community College on April 25th from 10:30-2:30 pm.
- Moderated by Stacey Shah, Rebecca Starkey, and Zohra Saulat

Agenda:

10:30 - 11:00 am: Arrival, mingling, and introductions

11:00 - 11:30 am: Tour of Elgin Community College Library

11:30 - 12:30 pm: Guided Conversation Part 1

12:30 - 1:15 pm: Lunch (provided by CARLI)

1:15 - 2:30 pm: Guided Conversation Part 2 & Reflection

12th Annual Instruction Showcase

- Date And Time: Tuesday, June 18, 9:00a.m.- 1:00 p.m.
- Location: Virtual through Zoom
- Attendance: 69 people registered as of May 30, 2024
- Description: We hope you've saved the date! Registration to attend the 12th Annual CARLI Instruction Showcase is now open. This free virtual event is hosted by the CARLI Instruction Committee and will be held via Zoom on Tuesday, June 18, from 9:00 am to 1:00 p.m CDT. Please share with anyone at your institution who may be interested: we welcome all library staff and LIS students to this event in the hopes of expanding our community of practice.

This year's program continues the committee's year-long theme of "New Directions and New Users," highlighting how libraries can broaden their services to reach different populations in novel ways. Keynote speaker María Emerson will discuss the impact of a sense of belonging and self-recognition in the library on student success. Presentations by librarians from a variety of CARLI institutions will explore diverse themes: inviting students into the process, navigating new approaches, collaborating across campus and a workshop on researching the library itself.

- [Instruction Showcase website](#)

Respectfully submitted by Abigail Mann and Alex Deeke, Co-Chairs, 2023-2024 on June 3, 2024.

CARLI OER Committee FY24 Annual Report

Members:

Joslyn Allison	2023-26	City Colleges of Chicago
Dorinne Banks, Co-Chair	2022-25	Adler University
Amber Burtis	2021-24	Southern Illinois University Carbondale
Kim Hale	2022-25	Columbia College Chicago
Lauren Kosrow, Co-Chair	2023-26	College of DuPage
Dan Matthews	2020-24	Moraine Valley Community College
Shelly McDavid	2023-26	Southern Illinois University Edwardsville
Christina Norton	2022-24	Bradley University
Dee Anna Phares	2022-25	Northern Illinois University
Tineka Scalzo	2021-24	City Colleges of Chicago

CARLI Staff:

Elizabeth Clarage, Anne Craig, Michele Leigh, and Nicole Swanson

Meetings:

The committee met monthly by conference call on the second Thursday of each month from 9:30 – 11:00 a.m.

Committee Projects:

Illinois State Library OER Grants

In February 2024, the Illinois Secretary of State/Illinois State Library announced the availability of Open Educational Resources Grants for members of the Illinois higher education community.

CARLI OER Committee members, past and present, helped to review the State Library grant applications, including Joslyn Allison, Dorinne Banks, Amber Burtis, Anne Chernaik, Kim Hale, Lauren Kosrow, Dan Matthews, Shelly McDavid, Elizabeth Nelson, Christina Norton, Michelle Oh, Tineka Scalzo, and Tamara Townsend.

Illinois Course Materials Survey: Student Perspectives

A subcommittee advised CARLI on the development 2023 [“Illinois Course Materials Survey: Student Perspective”](#) which identified Illinois students’ needs regarding affordable course materials and interest in Open Educational Resources or other affordable course material options. 4617 students representing 52 Illinois non-for-profit institutions participated. Key findings from this survey were presented in a [webinar](#) during Open Education Week.

Subcommittee members included: Kim Hale, Mallory Jallas, Lauren Kosrow, Daniel Matthews, Christina Norton, and Dee Anna Phares.

CARLI OER Website Review

During the month of February, committee members reviewed and updated the links and content on the CARLI Open Educational Resources [webpages](#).

Committee Events:

Understanding and Promoting Open Educational Resources Workshops

This 3-week virtual “Train the Trainer” course was developed in 2020 by the OER Committee and is based on openly licensed materials from the Open Education Network. It meets synchronously for an hour and half each week along with asynchronous readings and activities. During summer 2023, committee members reviewed and updated the course content. During FY24, 5 workshops were held in October, December, February, May, and June. 49 participants benefited from offering this course.

This course was taught by Melanie Armstrong, Dorinne Banks, Amber Burtis, Anne Chernaik, Cari Didion, Lauren Kosrow, Dan Matthews, Michelle Oh, Amy Pinc, and Dee Anna Phares.

OER Faculty Workshop

The Committee designed and developed in 2021 an OER Faculty Workshop to be offered periodically to faculty and administrators from Illinois institutions as well as those who are members of the Professional Development Alliance consortia. During Summer 2023, the OER Committee reviewed and updated the workshop content. The workshop was held in FY24 in September and twice in February. Eleven reviews were generated through member institutions offering stipends to their faculty, and 1 review through institutions with no incentive, who attended and wrote a review in the Open Textbook Library. Registration and attendance for both workshops demonstrated a strong interest in learning more about OER from faculty across the state as reflected in the numbers below. 73 total faculty members and librarians attended the workshops given by CARLI.

The workshop was taught by Joslyn Allison, Amber Burtis, Kim Hale, Lauren Kosrow, Dan Matthews, and Evangeline Reid.

Open Pedagogy Workshop

The Committee designed this workshop as a primer on open pedagogy for faculty at CARLI institutions. When attending this interactive workshop, faculty learn the definition and context of open pedagogy, view innovative examples being applied in a variety of subjects and formats, and work with other attendees to create an assignment that they can use in their own class. This workshop was held October 19 and March 8 as part of Open Education Week. A focused workshop for librarians interested in the topic was also held in November 2023. 49 total faculty members and librarians attended the workshops.

This workshop was facilitated by Christina Norton, Dee Anna Phares, Tineka Scalzo, and Chris Sweet. Dan Matthews and Shelly McDavid facilitated the program for librarians.

OER Commons and the Open Illinois Hub

Throughout 2023-2024 the OER Committee continued to promote using and adding to the Open Illinois Hub on OER Commons. Five CARLI libraries have developed intuitional presences within the Open Illinois Hub. The “Curated Collections” portion of the hub has been maintained over the last year.

Open Education Network: Certificate in Open Education Librarianship Program

In 2023, the CARLI OER Committee proposed to the Program Planning Committee to offer full scholarships for up to five librarians from CARLI-member institutions to attend the Open Education Network’s Certificate in Open Education Librarianship (formerly OER Librarianship). This proposal was accepted. In September, the CARLI OER Committee held an information session about the Certificate Program that allowed interested individuals to ask questions of their CARLI colleagues that had completed the program. There were seven registrants. Three individuals from CARLI Members were accepted into this competitive program and received funding from CARLI to participate in this program.

Creative Commons Certificate Program

The CARLI OER Committee proposed to the CARLI Program Planning Committee to offer partial registration reimbursement of \$200 each for up to 8 CARLI librarians and staff to complete the 10-week Creative Commons Certificate for Academic Librarians Program. This proposal was accepted. Four individuals from CARLI Members requested and received funding for this program in FY2024.

In exchange for funding, participants agree to share with CARLI two of their completed Creative Commons assignments. CARLI created the informational website, [Creative Commons Information – Handouts, Presentations, Videos and More](#) to benefit all CARLI Members interested in learning more about Creative Commons.

Open Education Week

As part of Open Education Week, March 4-8, 2024, CARLI hosted 5 events, which were documented on the [CARLI OER Open Education Week 2024 webpage](#).

Open Education Week Webinars:

- *Get to Know the new, upcoming Illinois SCOERs OER*
In this three-part series, project teams discussed their publications created as part of the Illinois SCOERs award.
 - *Program 1* (March 4, 2024), 33 members in attendance

- "Principles of Marketing for Transformation" & "Principles of Management & Leadership Centered Management"- Concordia University Chicago
 - "Addictions Counseling Essentials" & "Conceptual Physics" - College of DuPage
 - "The OER Guide to Media Writing" – Southern Illinois University Edwardsville
 - "Development of Ancillary Teaching Materials and Labs the OpenStax Anatomy and Physiology" - Roosevelt University
- *Program 2* (March 6, 2024), 41 members in attendance
 - “Fundamentals of Photography and Creative Practice” - Northern Illinois University
 - "Authoring Culture: The Foundations of Twenty-first Century Writing" – Columbia College Chicago
 - "Human Sexuality from A Sex Positivity Perspective" - Governor's State University
 - "Foundational Courses in the Theory and Practice of Media Arts" - Southern Illinois University Carbondale
 - "Traces: An Open Invitation to Archaeology" - Parkland Community College
- *Program 3* (March 7, 2024), 33 members in attendance
 - “Introduction to Engineering Drawing and Design” - Illinois Institute of Technology
 - “An Introduction to Human Nutrition” - Lincoln Land Community College
 - "Pharmacology-Principles/Application for Medical Assistants" - Moraine Valley Community College
 - "Chemistry and Society (Lab manuals)" - Triton College
 - “Essentials of Physiology for Nurse Anesthetists” - Southern Illinois University Edwardsville
- *Key Findings and Student Reflections from the Illinois Course Materials Survey: Student Perspectives* (March 5, 2024).
 CARLI staff members Nicole Swanson, Elizabeth Clarage, and Michele Leigh presented data collected from institutions in Illinois and highlighted key findings. Christina Norton (Bradley University) moderated a student panel discussion that reflected on the survey results.
 Student panelists:
 Alejandro Bottia-Forero, Columbia College Chicago
 Franklin Ocaña II, Oakton Community College
 Ayesha Shafiuddin, College of DuPage

Lauren Stec, University of Illinois Urbana Champaign
Claudia Zarycki, University of Illinois Urbana Champaign
197 people registered, 74 attended live, 53 viewed the recording.

- *CARLI Open Pedagogy Workshop* (March 8, 2024).
Registration information included within the Open Pedagogy Workshop section.

OER Community Chats

In FY24, the OER Committee renamed its OER Office Hours to OER Community Chats to better reflect the intent of this professional development opportunity to provide a space for informal discussions about OER among CARLI Members. Seven sessions were held throughout the year. The committee continued to take notes from the conversations and share them with the CARLI-OER email list to make them available to members that could not attend and provide links to resources shared during the conversation. 81 attendees joined and benefited from the talks over the year.

The topics of discussion included:

- *Academic Year Goals/Goal Setting* (September) facilitated by Lauren Kosrow
- *OER Rubrics: Answering Questions About OER Peer Review* (October) facilitated by Shelly McDavid
- *OER Sustainability, Incentives, and Burnout* (November) facilitated by Joslyn Allison
- *Local OER Programming* (December) facilitated by Dan Matthews
- *Dealing with Setbacks* (February) facilitated by Christina Norton
- *Open Pedagogy for DEI* (April) facilitated by Dee Anna Phares
- *Grant Programs: Lessons Learned* (May) facilitated by Kim Hale

CARLI U.S. Department of Education Open Textbook Pilot Grant: Illinois SCOERs Grant

CARLI received a 3-year award in two disbursements equaling \$2 million for Illinois SCOERs for the creation of open textbooks and ancillary materials that include 3D printing as a pedagogical tool funded by the Open Textbooks Pilot Grant received from the Fund for the Improvement of Post-Secondary Education (FIPSE) and the U.S. Department of Education. Round 2 and 3 awardees presented their projects during Open Education Week in March 2024 (mentioned above). All 27 projects are well underway and a few are completely finished. As of spring 2024, we have begun collecting data as faculty are teaching with the OER materials. Peer review is under way with a few of the projects, and once that is completed, we will have official press releases.

Future Plans:

New Professional Development Program – Committee members are helping to plan a Fall 2024 (November 1, 2024) in-person OER programming and networking event in collaboration with other Illinois organizations to be held in central Illinois.

Open Pedagogy Workshop – The OER Committee plans to review curriculum over summer to be more interactive.

OER Community Chats – The OER Committee decided to hold two chats during the fall and two chats during the spring.

Illinois SCOERs – in June CARLI will officially request a one year no cost extension for the SCOERs grant. This will extend the grant until August 30, 2025.

CARLI Preservation Committee
FY 2024 Annual Report of Activities and Projects

Members

Theresa Embrey	2021-2024	Pritzker Military Museum & Library
Patti Gibbons	2023-2026	University of Chicago
Tonia Grafakos	2018-2024	Northwestern University
Gabriel Hamer	2023-2026	Newberry Library
Jade Kastel	2021-2024	Abraham Lincoln Presidential Library and Museum
Heidi Marshall	2022-2025	Columbia College Chicago
Bonnie Parr	2023-2025	Abraham Lincoln Presidential Library and Museum
Shelby Strommer	2022-2025	University of Illinois Urbana-Champaign
Bradley Wiles	2023-2026	Northern Illinois University

CARLI Staff Liaisons: Elizabeth Clarage and Nicole Swanson

Meetings

The Preservation Committee met 11 times during 2023-2024:

- 11 conference calls held over Zoom: August 30, September 11, October 10, November 13 and December 11, 2023; January 8, February 12, March 11, April 22, May 21, and June 10, 2024.

Activities

- **Annual Project:** [Disaster Planning 101](#) is a series of articles written by the CARLI Preservation Committee over the course of FY2024, designed to introduce topics related to disaster planning and response in libraries and archives, tailored to CARLI member institutions of any size. These articles were shared in the monthly *CARLI News* and posted online.
 - **September:** [Disaster Planning 101 Introduction](#), Shelby Strommer
This series provides tips and resources to support CARLI member institutions as they draft, revise, maintain, and practice their disaster plans. Whether an institution is starting from scratch or already has an established plan, the Disaster Planning 101 series can provide guidance to prepare staff and safeguard collections.
 - **October:** [Disaster Planning Resources & Securing Fundings](#), Jade Kastel
In this article, Jade Kastel, Western Illinois University, shares tips on the preparations to take before a disaster, funding disaster preparedness, and steps institutions can establish beforehand to help manage and mitigate in the event of a disaster.
 - **November/December:** [Seven Steps to Preparing a Disaster Preparedness and Response Plan](#), Heidi Marshall
A disaster preparedness plan is designed to reduce the impact of mold, water, pests, and other issues that may affect our collections and enable us to react quickly in emergencies within your library and archive collections. Authoring

such a plan isn't difficult, especially if taken in a few key steps.

- **January:** [Staff Training on Disaster Preparedness](#), Gabriel Hamer
The best-written disaster plan can't do much without properly trained staff! Break staff training goals down into three categories: short-term, long-term, and institutional. It takes time to bring coworkers and information networks up to speed, so it helps to be realistic and spread tasks out along a rough timeline.
- **February:** [Technology, Apps, and Online Resources for Disaster Preparedness and Response](#), Patti Gibbons
Disasters and collection emergencies happen, and apps and other electronic technology tools can be effective and time saving assets to incorporate into your emergency response kit. View some tech options and online resources to consider adopting to help preserve your library's collections.
- **March:** [Collections-Specific Salvage](#), Bradley Wiles and Bonnie Parr
Water damage can happen any time and it can be catastrophic. Given the likelihood of water-based event--as well as the difficulty in predicting them--the best policy is to have an effective response plan to mitigate the damage. But that can be tricky because different materials require different mitigation methods when a water event strikes, and this may not be immediately clear to those responding. This article provides information and clear instructions regarding salvage of wet materials based on the type of object from the Disaster Preparedness and Emergency Response Plan of the Abraham Lincoln Presidential Library and Museum.
- **April:** [Working with a Remediation Vendor](#), Tonia Grafakos
Sometimes large-scale collections emergencies require outside help from a disaster recovery vendor. What should libraries consider when choosing a remediation vendor? What information is most helpful during the initial conversations after an emergency? What should library staff expect when a vendor is on site? Tonia Grafakos spoke with an expert from a disaster remediation company to discuss these questions and more.
- **May:** Series Wrap-up, Shelby Strommer
This brief re-cap summarizes each article in the series. It was shared in the [May 2024 CARLI Newsletter](#).
- **In-person Outreach:** "Table Talk: Share your biggest preservation challenges," CARLI Annual Meeting, November 16, 2023, in Champaign and online.

Committee members were available to answer specific preservation-related questions, as well as discuss ongoing preservation challenges shared by attendees from CARLI member institutions. As a result of the preservation needs expressed during this discussion, the committee added additional digital preservation links to the Preservation Resources webpage and partnered with Digital POWRR to plan a webinar focused on digital preservation for small institutions.
- **PDA Webinar:** "Poison in the Stacks? Ongoing Research on Heavy Metals in 19th Century Books," presented by Patti Gibbons, Tonia Grafakos, and Shelby Strommer, April 30, 2024

Recent research in the cultural heritage field has identified the presence of arsenic and other heavy metals in pigments used on 19th Century books. How does this impact libraries with older books in their collections? This webinar provided a brief introduction to this area of research and how it became a hot topic in the conservation field, and an overview of projects currently underway at three Illinois universities. Staff from Northwestern University, University of Chicago, and University of Illinois Urbana-Champaign discuss their ongoing research, as well as access and handling policies for 19th C. materials, at their respective institutions. We will also provide information to help smaller institutions decide how they may want to approach potentially toxic heavy metals in their own collections. 188 people registered to attend this event and 134 attended live.

- **Online Resources:** [Preservation Resources webpage](#)
Committee members review this webliography annually to ensure links are active and resources are appropriate, and to add new links to content relevant to CARLI members. This year the committee also worked with CARLI staff to improve navigability and provide access to previous committee content.
- **Future Planning:** PDA Webinar: “Digital Preservation 101” Jaime Schumacher, Digital POWRR, July 23, 2024
This session of the *Funding to Preservation: A Digital Content Life Cycle Webinar Series* is designed for smaller, under-resourced organizations who understand the need for digital preservation but are not sure how to begin creating daily workflows that incorporate accessioning, processing, and storing digital materials (both born-digital collections and files from digitization projects). The digital curation lifecycle will be viewed through a practical lens and the class will step through an end-to-end workflow for a hypothetical digital collection using simple, open-source digital preservation tools.
- **Future Planning:** In-person Burn Simulation and Recovery Workshop, Illinois Fire Service Institute, date and time TBD.
The committee planned this event which was originally scheduled for May 9, 2024 and postponed due to an IFSI scheduling conflict. When this workshop is rescheduled for a future date, fire professionals will initiate and extinguish a fire so attendees can practice hands-on collection materials salvage. The event will also include fire extinguisher training and presentations from fire professionals and National Heritage Responders. Thanks to generous support from CARLI, this workshop will be free to participants from member institutions.
- **Future Planning:** CARLI Preservation Survey
The committee began discussing a new Preservation Survey to gather information about the preservation activities across CARLI member institutions, and to identify their major challenges and needs. This survey was previously conducted in 2015, and updating this information will help inform future committee activities and projects.

Respectfully submitted by
Shelby Strommer (University of Illinois Urbana-Champaign)
Chair, 2023-2024

2024-2025 CARLI Public Services Committee Annual Report of Activities and Projects

Members

Name	Term	Institution
Steven Brantley	2022 - 2024	Eastern Illinois University
Beth Hultman	2023 - 2026	Elgin Community College
Jennifer Lau Bond	2022 - 2025	Harper College
Ashley McMullin, Co-Chair	2021 - 2024	DePaul University
Charity Ringel	2024 - 2024	University of Illinois Springfield
Gretchen Schneider	2023 - 2026	Oakton College
Kimberly Shotick	2023 - 2026	Northern Illinois University
Arlie Sims, Co-Chair	2021 - 2024	Columbia Collection Chicago
Simone Williams	2022 - 2025	Southern Illinois University Edwardsville
Lesley Wolfgang	2022 - 2025	Saint John's College of Nursing

CARLI Staff Liaisons:

Elizabeth Clarage
Denise Green

Meetings:

For FY24, the Public Services Committee met eleven times by conference call.

Activities:

The Public Services Committee focused its efforts this year on how academic libraries are approaching Generative Artificial Intelligence, commonly known as Generative AI, and their role in those conversations and efforts on their campuses. The committee defined Generative AI as an artificial intelligence that generates new content using machine learning based on input from the user. Some common examples are ChatGPT, Bard, and GPT. The committee completed the following four tasks in this area:

1. conducted an informal environmental scan to identify academic libraries leading the way in these initiatives;
2. distributed and discussed the results of a survey to CARLI member libraries;
3. conducted interviews with survey respondents whose responses suggested a leadership in AI role on their campus;
4. hosted a panel discussion on the topic.

Environmental Scan

Members of the committee reviewed academic library websites and recent publications to identify academic libraries across the country that were leading efforts on their campus to navigate the increased influence and use of generative AI by students, faculty and others. The committee identified institutions that were incorporating generative AI in library courses, building learning communities, collaborating with AI labs on campus, hosting workshops, developing research guides with generative AI tools, ethical considerations, and critical information literacy components and citation support for AI generated content. Based on the scan, the committee determined that engagement with generative AI varied greatly across academic libraries and we wanted to learn more about the role of Illinois academic libraries in developing capacity and policies for the use of generative AI at their institutions.

Survey

The committee conducted a survey designed to learn the role CARLI member libraries play or will play at their institutions as related to Generative AI. The survey was distributed to all CARLI member libraries and multiple responses were allowed from each institution. 58 people responded to the survey. A sample of findings include:

- Just over half of the respondents said their library is:
 - Contributing to, but not taking the lead, in setting standards and/or best practices at your institution. 56.14%
 - Learning from different fields and academic departments about their different applications, challenges, and opportunities experienced related to Generative AI. 54.39%
 - Teaching and promoting ethical use of Generative AI, including copyright, bias, equity concerns, and or accuracy checking. 57.89%
- In the next two years, over 75% of respondents hoped to:
 - Learning from different fields and academic departments about their different applications, challenges, and opportunities experienced related to Generative AI. 76.79%
 - Teaching and promoting ethical use of Generative AI, including copyright, bias, equity concerns, and or accuracy checking. 76.79%
- Respondents reported Programming, Sharing Experiences, and Resource guides would be most helpful to them in this area.
- Common concerns include:
 - Lack of time or bandwidth to develop expertise in this area
 - Ethical considerations
 - Lack of clarity concerning who is responsible for this work
 - Silos within academic colleges and departments responding in different ways

Interviews

Committee members contacted three survey respondents who indicated they would be available for an interview for consideration as potential panelists for a CARLI program. After those interviews, the committee agreed to invite the following librarians to serve as panelists because they represented a range of institution sizes/types and approaches.

- Joliet Junior College: Aimee Walker
- National Louis University: Amy Hall and Sarah Leeman
- Northwestern University: Michelle Guittar

Panel Discussion Program

A panel discussion, “What Do We Do Now? Generative AI and the Academic Library's Role on Campus” is planned for June 24 at 1:00 - 2:00 p.m.

The session will include a brief overview of the Committee's 2024 Member Survey "Generative AI and the Academic Library's Role on Campus" and a panel presentation on their current activities with time for questions and discussion.

Respectfully submitted, Members of the 2023-2024 CARLI Public Services Committee

Resource Sharing Committee Annual Report 2023-2024

Members

Elena Carrillo, University of Illinois Chicago
Marissa Ellermann, Southern Illinois University Carbondale, Co-Chair
Sarah Henderson, Monmouth College, Co-Chair
Sarah Hoeksema, Trinity Christian College
Christine Kuffel, Harper College
Joshua Newport, Illinois State University
Claire Salvati, Judson University
Janelle Sander, University of Illinois Urbana-Champaign
Julia Venetis, College of DuPage

CARLI Staff Liaisons

Debbie Campbell
Bradley Woodruff

Meetings

Meetings for the committee all took place on the second Thursday of the month from 10-11:30am via Zoom.

Completed Terms

The Committee sends our sincere thanks and appreciation to our dedicated committee members whose terms are ending this year:

- Elena Carrillo, University of Illinois Chicago, 2021-2024
- Marissa Ellermann, Southern Illinois University Carbondale, 2021-2024, Co-Chair 2023-24
- Sarah Henderson, Monmouth College, 2021-2024, Co-Chair 2023-24

During the June 2024 meeting, the Committee will select the committee co-chairs for the FY25 year.

Committee Charge

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 Governance Board, or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The Resource Sharing Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, equity, and inclusion, and will ensure that CARLI's commitment to diversity, equity, and inclusion is embedded in their work. 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 Governance Board.

Theme

The committee took a more flexible approach to our programming this year and made the decision to have fewer webinars and add additional focus to our testing of Alma features that would benefit the entire consortia. Additionally, we submitted policy recommendations that would provide consistency across CARLI institutions where possible.

Annual Project

Like previous years, the Resource Sharing Committee decided for FY24 to focus on education and Alma testing and improvement projects rather than a single annual project. Below we have detailed the webinars we hosted in addition to the behind the scenes testing we performed to troubleshoot or improve services for staff and users.

Alma Testing and Continuing Education

Block 5 Testing

Scenario 1: Level 5 Block applied to local patron manually

- Works as expected – does not allow patron to request local/I-Share items or loan any new items in I-Share
- Hides all the links (an improvement, in my opinion, from our testing last time)
- In I-Share catalog, shows message about no items being available for the service (another good thing, IMO) Better than simply hiding some links and not others!

Scenario 2: Level 5 Block applied to I-Share patron manually

- Only blocks patron from requesting/loaning materials from the institution that put the block on

Scenario 3: Level 5 Block automatically applied through Overdue/Lost loan job

- Does apply block
- Block does not appear in prominently in patron's online account – only if the patron looks in their personal information page
- If item that initiated the block is renewed, block goes away – it works as expected

Concluding thoughts/questions back to the Res Sharing Committee for further discussion in FY25:

- Knowing that the level 5 block would only be applied for a 2 week period of time (between 21 days overdue and 35 days, when it goes to lost), what is the benefit of enabling this block to be applied automatically with the overdue/lost loan job?
- Depending on what we decide, should we revisit the wording on the overdue emails?

- Should we let I-Share institutions know that a Block level 5 exists so they can use it locally if they wish?

Personal Delivery Testing

- Personal delivery internally at UIU is working as anticipated (only tested with a UIU Main stacks item for Main Stacks pickup).
- All personal delivery requests placed in UIU's PrimoVE for a UIC item were rejected by UIC.
- A test personal delivery request placed in UIU's Alma for a UIC item was accepted by UIC, but, instead of routing to personal delivery, routed to ACES.

December 12, 2023 – CARLI Resource Sharing Committee Discussion: "I Want My Two Dollars: Handling Lost & Replacement Fee"

The CARLI Resource Sharing Committee held a conversation focusing on the handling of lost & replacement fees and on potentially enlisting other institutions in the item recovery process.

Questions for discussion included:

- Do you have a replacement cost and how did you determine this cost?
- Do you accept replacement copies and under what conditions?
- Do you waive a replacement fee and if so, when and how much?
- Do you enlist the patron's home institution for help and if so, when?

This session with 61 registrants was not recorded; the link to the webinar page is below:

<https://www.carli.illinois.edu/ResourceSharingDiscussion-20231212>

Alma Anonymization Policy sent to the Board of Directors for approval

This was a topic of discussion for the Resource Sharing Committee, which culminated in a policy drafted by CARLI staff for the CARLI Governance Board, recommending that CARLI return to anonymization. Below is the timeline from submission of the policy for approval to the date recommended for anonymization to resume:

- March 2024:
 - CARLI Governance Board discussion and endorsement of policy to enable Alma Anonymization of user transaction data in the I-Share Alma Network.
 - CARLI confirms with Ex Libris that the requested changes within Alma Analytics have been completed as expected.
- April 2024:
 - CARLI announces to I-Share libraries the timeline for when anonymization will be enabled, including a roster of webinars and documentation for I-Share institutions to learn how to update their own Alma Analytics reports and reporting processes.
- May 2024:
 - CARLI requests confirmation from all I-Share Liaisons that their libraries are aware of the upcoming changes.

- CARLI provides training and explanatory webinars.
- CARLI updates centrally-run annual statistics to reflect necessary changes to Alma Analytics.
- June 2024:
 - CARLI works with I-Share libraries, as needed, to assist in updating individual library Alma Analytics reports.
- July 2024:
 - CARLI enables Alma Anonymization for all I-Share libraries in each Institution Zone using the Alma-specific settings described in Appendix 1.
 - CARLI announces to I-Share libraries that this project has been completed and that I-Share libraries should not edit the consortial settings in Alma Configuration related to the Alma Anonymization Job
- Link to CARLI documentation on Alma Anonymization, configuration settings, and important deadlines: <https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/anonymization>

April 26, 2024 – Resource Sharing Committee Panel - Beyond Borders: Exploring the Present and Future of Library Resource Sharing

- Panel Discussion featuring perspectives from CARLI leadership and resource sharing leadership in other states and consortiums. Panelists included:
 - Gerri Moeller, Associate Director for Resource Sharing and Delivery, Minitex,
 - Deborah Ehrstein, Head of Access Services, Olin Library at Washington
 - Rob Ross, Executive Director, NC Live
 - Anne Craig, Senior Director, CARLI
- To facilitate conversation and lead the discussion, we created a series of questions to guide the panelists. Questions are as follows:
 - Day-to-day Questions:
 - What impact does Resource Sharing have on the products and services you use and support?
 - How do consortial acquisitions inform your approach to and planning for sharing resources?
 - What recent changes and trends have impacted Resource Sharing?
 - How have changes in Resource Sharing impacted your approach to scheduling and staffing?
 - What stands out as something that is being handled differently regarding Resource Sharing?
 - Theoretical/Future Questions:
 - What external factors present challenges for Resource Sharing? What factors inspire opportunities and improvements for Resource Sharing?
 - How do you think Artificial Intelligence will impact Resource Sharing? What challenges does Artificial Intelligence impose on Resource Sharing?
 - How do you see Resource Sharing changing over the next 10 years?

This session with 46 registrants was recorded and posted to the CARLI website:
<https://www.carli.illinois.edu/beyond-borders-exploring-present-and-future-library-resource-sharing>

Additional Alma testing and configuring during the FY24 year

- Hold Shelf Reminder Letter
 - Ex Libris released a new letter in Alma, the “on hold shelf reminder letter.”
 - The committee decided to standardize the reminder across I-Share; to be sent after the item has been waiting on the hold shelf for the 8th day.
- I-Share Requesting Over Winter Break
 - I-Share libraries were surveyed in November 2022 if they preferred to have I-Share requesting paused over winter break (allowing patrons to make requests while the library is closed) or stopped over winter break (not allowing patrons to make requests until the library re-opens).
 - Based on survey responses, the committee continued their recommendation in 2023 to pause I-Share requesting this year, and make pausing the regular practice moving forward, with a reminder sent on November 1st of each year.
- Best Practices for handling I-Share requests that represent a patron’s request to have the material digitized.
 - After discussion, CARLI Office staff will add this language to the top of the Resource Sharing request form in Primo VE in the sandbox for the committee to continue testing in FY25:
 - “I-Share is for requesting physical materials only. If you need a PDF or other scan, please contact your library for more information.”
 - If testing returns positive, this wording will be added to the I-Share request forms in production for all I-Share libraries.

**2023-2024 CARLI Technical Services Committee:
Annual Report of Activities**

Members:

Tammie Busch, Southern Illinois University Edwardsville, Co-Chair
Ellen Corrigan, Eastern Illinois University
Jodi Craiglow, Trinity International University
Brent Eckert, Rock Valley College
Stephanie Fletcher, Illinois Institute of Technology
Gail Heideman, Knox College
Susan Howell, Southern Illinois University Carbondale, Co-Chair
Lauren Noel, Columbia College Chicago
Jackie Zook, Northeastern Illinois University

CARLI Staff Liaisons:

Jen Masciadrelli
Ted Schwitzner

2023-2024 Accomplishments:

This year the Committee divided into three Subcommittees, one focusing on authority control, one focusing on suggested priorities for bibliographic, holding, and item maintenance, and one focusing on training. The full committee met monthly on the second Wednesday. During the second half of the meeting we divided into our Subcommittees to conduct our work.

Authority Control

Subcommittee members: Brent Eckert (lead, Rock Valley College), Ellen Corrigan (Eastern Illinois University), Lauren Noel (Columbia College Chicago). CARLI advisor: Ted Schwitzner.

The Authorities Subcommittee has been working on issues related to authority control in Alma/Primo VE this year. We have discussed the preferred term correction job and the reported problems with its functionality. We have also considered whether the OCLC update service could be implemented in the network zone (NZ) to help with updating authority headings in bibliographic records. We identified that duplicate records in the NZ could pose a problem regarding batch updating of bibliographic records. We have also considered whether CARLI could or should create a recommended “harmful language in the catalog” statement that member libraries could adopt. We have also tested various ways of updating and correcting authority headings in Alma and how they display in Primo VE. Another area of work has been considering implementation of some form of reparative cataloging. This could include updating or hiding headings with offensive terminology (such, as “illegal alien”) and terminology referring to indigenous peoples. The subcommittee is also drafting a survey to send out to CARLI libraries about authority control and the need for training.

Subcommittee report submitted by Brent Eckert

Suggested Priorities for Bibliographic Maintenance Analysis Subcommittee

Subcommittee members: Jackie Zook (lead, Northeastern Illinois University), Tammie Busch (Southern Illinois University Edwardsville), Susan Howell (Southern Illinois University Carbondale). CARLI advisors: Jennifer Masciadrelli, Adrienne Radzvickas, and Annie Serrano.

The Bibliographic Maintenance Analysis Subcommittee reviewed all items in CARLI's "Suggested Priorities for Bibliographic, Holding, and Item Maintenance" previously created for the Voyager environment and performed an in-depth analysis of each item to determine whether they were still relevant for Alma. The effects of the bad data were considered. If still relevant in Alma, we examined the frequency of clean up to determine if it would be the same as the Voyager environment. Then we investigated whether or not there was a report in either Alma Analytics, or if an Alma repository search could be performed to retrieve the desired data set.

After all of the priorities were analyzed we separated each item into one of four categories:

- Items still relevant and reports available.
- Guidance from CARLI as to the impact of the bad data or help creating a report.
- Guidance from the Discovery Committee to see if these items impact discovery in Primo VE.
- Items that are no longer relevant in Alma.

From this analysis, CARLI staff began creating a web page with items that are still relevant and have a report available. The building of this web page will continue as priority items are analyzed for relevancy and reports are created.

We recommend next year's committee continue assisting CARLI and the Discovery Committee in completion of this web page and promote this web page to CARLI member institutions. We also suggest next year's committee survey CARLI libraries to see if there are any maintenance activities they are performing that are not included in the original document.

Report submitted by Jackie Zook, Tammie Busch, and Susan Howell

Training Subcommittee

The Training Subcommittee consisted of Stephanie Fletcher (lead, Illinois Institute of Technology), Jodi Craiglow (Trinity International University), and Gail Heideman (Knox College). CARLI advisor: Martin Kong.

The Training Subcommittee organized one webinar and co-organized another webinar this year. Gail Heideman from Knox College led an hourlong tutorial about the OCLC product Worldshare Record Manager on April 18, 2024. Gail discussed how to set up Record Manager, presented tips for performing searches in the system, introduced ways to integrate Record Manager into libraries' existing cataloging workflows, and performed a comparison between Record Manager and Connexion. CARLI recorded this webinar and [it is available on YouTube](#). The committee also co-organized a webinar, still upcoming at the time of this report, on authority headings.

Brent Eckert from Rock Valley College will explore the value of authority headings and introduce the steps necessary to develop a name authority heading. The presentation will also demonstrate how to create personal name headings according to RDA guidelines. This program will take place at 2:00pm on June 20, 2024.

The Training Subcommittee discussed the use of CARLI's [Shared Document Depository](#) and considered ways to publicize this resource, solicit new contributions, and encourage past contributors to update their content to align with the new Alma UI. Specifically, we would like to invite CARLI librarians to contribute system-neutral training material on the subject of cataloging, Cuttering, and call number building. As part of this project, Stephanie Fletcher wrote a draft for an email that solicits these types of documents. We did not fully realize this project, so we propose that the 2024-2025 Technical Services Committee continue this work. Lastly, Jodi Craiglow surveyed continuing education and professional development opportunities for technical services librarians and created a useful resource list. As part of this project, we advertised a 20% discount to Library Juice Academy that is available to CARLI member libraries.

Subcommittee report submitted by Stephanie Fletcher

Future Plans:

The TSC will continue meeting in FY25. It is recommended TSC members consider focusing on the following:

- Continue addressing reparative cataloging.
- Survey CARLI libraries about authority control and the need for training.
- Complete the web page for updating “Suggested Priorities for Bibliographic, Holding, and Item Maintenance” for the Alma environment.
- Survey CARLI member libraries for local maintenance activities for possible inclusion on the web page for “Suggested Priorities for Bibliographic, Holding, and Item Maintenance.”
- Consider ways to publicize CARLI's Shared Document Depository, solicit new contributions, and encourage past contributors to update their content to align with the new Alma UI.
- Invite CARLI librarians to contribute system-neutral training material on the subject of cataloging, Cuttering, and call number building.

Anne Craig asked all CARLI committees for suggestions on how to return to in-person events. TSC members recommended offering both a small-scale Fall event and a larger, centrally located Spring Forum. TSC members were in favor of an in person single-day open house event in the Fall, visiting 2-3 libraries in proximity to each other (perhaps in the Chicagoland area) as a way to network and share local practices within the CARLI community.

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

**CARLI Archives Task Force
FY 2024 Annual Report of Activities and Projects**

Chair: Pam Hackbart-Dean, University of Illinois Chicago

Members: Alex Altan, Prairie State College
Jeannette Bruno, City Colleges of Chicago
Rebecca Fitzsimmons, Illinois State University
Ashley Howdeshell, Northeastern Illinois University
Steve Kerber, Southern Illinois University Edwardsville (resigned 1/2024)
Marcella Lees, Southern Illinois University Edwardsville (joined 1/2024)
Michelle Miller, Abraham Lincoln Presidential Library and Museum
Elaine Fetyko Page, Elmhurst University
Meghan Ryan, National Louis University

CARLI Staff Liaisons: Elizabeth Clarage, Martin Kong

Charge: The task force, guided by the results from the 2023 Archives Survey from the CARLI Collection Management Committee, will help members' efforts with archives, including their development, stewardship, and promotion. This work includes identifying best practices and continuing education for members related to archives.

The initial term of the task force will be one year, with an initial report to the Board for consideration at their March 2024 meeting.

Meetings: The task force generally meets on the first Monday of the month from 10:00 – 11:30 am via Zoom.

Activities: This year's primary goal was to provide resources and suggest training to assist our members in assessing and preparing the care and access of archival collections. This support applies to all institutions and collection sizes.

The primary project was to create an online **Archives & Special Collections Resource Page** to provide CARLI members with information and resources about managing archival collections. In December 2023, the task force submitted an article for the CARLI Newsletter that updated the CARLI Membership on its work. In January 2024, the task force called for member submissions of forms, policies, and collections statements to be included on the resource page. This first call was for documents related to the administration and management of an archives/special collections.

The page launched in April 2024 and was announced in the CARLI Newsletter. It can be found in the Collections Management area of the CARLI website here:

<https://www.carli.illinois.edu/products-services/collections-management/archives-special-collections-resources>. There will be subsequent announcements of the page to solicit additional member-shared documentation and to draw more attention to the site.

As directed by the CARLI Board, the task force submitted a report of its work to the CARLI Board for its March 2024 meeting. The task force requested another year to complete its charge as its work would not be completed by June 2024. The CARLI Board supported this extension through June 2025.

Future Plans: The task force, after receiving confirmation from the CARLI Board to continue in FY 2025, wants to focus on outreach, with a special focus on smaller institutions with fewer resources for managing archives. The task force brainstormed several ideas, including:

- A panel discussion (online) on archives administration, especially the first stages of developing an archives
- Short videos created by members on individual topics that could be added to the CARLI Archives & Special Collections Resource Page
- A hands-on workshop at a member institution, where participants could experience accessioning and processing a collection
- A site that features articles written by members about certain topics in archives and special collections and/or projects they have completed (Similar to the Preservation Committee's *Preservation Tips*)