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Members:

David Bell (2018-2021), Eastern Illinois University
Daniel Blewett (2017-2020), College of DuPage, Co-Chair
Chad Buckley (2017-2020), Illinois State University
Kelli Getz (2018-2021), DePaul University
Paolo Gujilde (2018-2021), Northwestern University
Connie James-Jenkin (2016-2019), Illinois Mathematics and Science Academy
Michelle Oh (2017-2019), Northeastern Illinois University
Gretchen Schneider (2016-2020), Oakton Community College, Co-Chair
Kimberly Shotick (2016-2019), Illinois Institute of Technology

Staff liaisons:

Elizabeth Clarage
Jennifer Masciadrelli

Meetings

The committee met monthly, with 1 in-person meeting at Northeastern Illinois University. The other meetings were conducted via conference calls.

Presentations

- CARLI Annual Meeting, November 2, 2018: 2017-2018 "Collaborative Collection Development Continued and Expanded," presented by Gretchen Schneider, Oakton Community College.
- CARLI "Change is Good" conference, April 2, 2019: "Managing Change in Collection Management," presented by Michelle Oh, Northeastern Illinois University, Paolo Gujilde, Northwestern University, and Kimberly Shotick, Illinois Institute of Technology.

Accomplishments

- Reviewed and updated the CARLI Scholarly Communications website in fall 2018 and spring 2019.
- Created a webpage for the CARLI Open Access eBook Pilot Project. https://www.carli.illinois.edu/products-services/collections-management/OA_eBooks
- Worked with CARLI staff to develop workflows to add open access eBook collections to the shared catalog.
- Reviewed and selected open access eBook collections to add to the CARLI Open Access eBook Collection Pilot Project based on evaluation criteria set forth by the Committee. Forty-eight CARLI member have currently opted-in to this collection.
- Conducted a survey of CARLI institutions regarding how they handle Textbook Reserves and Curriculum Materials collections in spring 2019.

- Co-sponsored and planned the CARLI "Change is Good: You Go First! Leading Others To and Through Change" conference on April 2, 2019 at the University of Illinois at Chicago which had 120 registrants and 2 vendor sponsors. The program website is https://www.carli.illinois.edu/products-services/i-share/secure/change_is_good_you_go_first .

Future Plans

- Review and update the CARLI Scholarly Communications website.
- Review and add more open access eBooks to the CARLI Open Access eBook Collection Pilot Project.
- Present in Spring 2021 webinar series on using statistics available via the shared catalog to inform collection development.
- Investigate how eTextbooks are handled in CARLI libraries.
- Create a guide on best practices to establish a Textbook Reserves collection.
- Poll consortium about usage of a formal collection development policy and consider creating a best practices webpage for creating or updating a formal policy if needed.

Overview

The Collection Management Committee focused on one continuing project: an Open Access eBook Pilot Project as well as two new projects: the Statistics Project, and the Textbook Reserve & Curriculum Material Survey Project. The Open Access eBook Pilot Project, with the goal of enhancing the statewide collection of books, identified open access eBook collections to add to I-Share. The intent of the Statistics Project was to identify statistics that could be used to inform local collection development and share them with the consortium. The Textbook Reserve & Curriculum Material Survey Project gathered data on the current trends and procedures used for textbooks and to purchase curriculum material in CARLI in order to share the resulting information with the consortium and inform current and possibly future projects.

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Open Access eBook Collection Pilot Project

In 2017-2018, the Committee created a consortial collection development policy for open access materials. This year the committee developed a pilot project using that policy to identify open access collections to add to I-Share. The pilot project goal was to develop the workflows needed by the committee and CARLI staff to add identified collections to a curated and shared open access collection.

To publicize the pilot project to the CARLI membership, CARLI staff using the information from the Committee's 2017-2018 project, created a webpage that outlined the project with the criteria for the CARLI Open Access Materials Collection and the list of collections that the Collection Management Committee identified as ones to be included in this new open access curated collection. The webpage can be found at: https://www.carli.illinois.edu/products-services/collections-management/OA_eBooks. The Committee invited I-Share libraries to opt in to have the CARLI Open Access Materials collection available in their local VuFind collection, and 48 members chose to opt in. The list of collections has grown over the past year as the committee reviewed a variety of open access collections listed in OCLC WorldShare Collection Manager Knowledge Base for possible selection for this collection.

Evaluation

The Committee developed a subgroup on this topic. Members of the OA subcommittee began the process by evaluating OA collections rather than individual OA titles. As a starting point, subcommittee members

compiled a list of potential collections that were included from OCLC WorldShare Collection Manager Knowledge:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/WorldCat_knowledge_base_data_updates/Collections_available_in_the_WorldCat_knowledge_base.

Subcommittee members reviewed potential collections on the following, but not limited to, criteria:

- Desirable Characteristics:
  - Scholarly subjects
  - Published by a scholarly or university/academic press
  - Stable URL
  - English language
  - Broad academic audience appeal
  - Lasting academic value
- Undesirable Characteristics:
  - Self-published
  - Highly specialized
  - Widely available in other areas for CARLI members

After review by the subcommittee, recommendations were forwarded to the full committee and the decision to add individual collections was put to a vote.

At this time, the following OA eBook collections have been selected to be added to the I-Share catalog:
- JSTOR Open Access (added to collection)
- Luminos Open Access University of California Press
- Project Muse Open Access
- Springer Nature open Access

CARLI Staff Workflow

CARLI Staff developed an internal workflow to ensure each collection would be added in the same manner. As part of the process, CARLI staff reviewed the collection's MARC records received from the OCLC Knowledgebase and then developed specifications for improving the MARC records via a batch process. Once the batch process was completed, the edited records were loaded into the CARLI Resource Database (RESdb) and then scripted by CARLI staff to appear in the local VuFind instances of the 48 I-Share members that opted in to the project as well as in the I-Share Union Catalog. CARLI staff use Smartsheet to manage the process for each collection to be added.**Statistics Project**

The Collection Management Committee worked with the Resource Sharing Committee to develop a list of statistics that could be used to inform local collection development. This list combines suggested local collection statistics and interlibrary loan statistics. The committees decided to share this information via a webinar series entitled "There's a Report That Does That? Using Statistics to Inform Collection Development."

The first Webinar, "Your Collection, Data, and How to Use It - Statistics for Items in Your Local Collection" was divided into two parts. The first part would discuss what data collection developers can use and where to find it in a general sense for all libraries. It would discuss various datasets one can look for in subject areas as well as ways of assessing the success of collection development choices. The second part would discuss reports available in Voyager that can inform collection development for

I-Share libraries. Statistics included various conspectus reports that gather a variety of statistics in specific subject areas as well as various inventory and circulation queries.

The second webinar, "Your Collection, Data, and How to Use It - Statistics for items Outside Your Local Collection was also divided into two parts. The first part would discuss in general terms for all members various types of Interlibrary Loan statistics one can look for and how to use them to inform collection development. Part two would discuss statistics that could be gathered from Illiad/Tipasa, OCLC, and I-Share specifically.

However, once the date of migration from Ex Libris Voyager to Ex Libris Alma was announced as June 24, 2020, the group decided to postpone the webinars until Spring of 2021 so that data from Alma could be incorporated into the webinars instead of data from Voyager. The committee plans to record the webinars for future reference, and it felt the topics would be more valuable to the CARLI membership after the migration.

In order to utilize Ex Libris Voyager statistics assembled for these webinars, the committee is creating a webpage on CARLI's website with the identified statistics to be used until the conversion to Alma. The page is entitled: "Collection Related Reports Available from Your Voyager Data." When available, the webpage will be announced in the CARLI newsletter.

Textbook Reserves & Curriculum Materials Survey Project

Executive Summary

The CARLI Collection Management Committee identified two topics of interest to the CARLI membership that warranted further study: course textbook reserves and education curriculum collections. A survey was sent to the directors of CARLI institutions, asking for information regarding their institutions' methods of handling these specific collections. The responses were examined in order to understand what libraries are doing and to formulate conclusions.

As expected, situations vary at all institutions: what libraries are doing, the expectations as to what students and libraries should separately be responsible for, and the role of campus bookstores. The nature and role of these items mean that current editions are usually not available for loan to other institutions. The overarching concern, both now and for the future, is the rational expenditure of limited institutional financial resources in order to achieve the best results. It is hoped that this report will provide some understanding of how Illinois academic libraries deal with these situations and provide help for those libraries looking to modify a current operation or establish a new one.

Introduction

An integral part of library operations is how to best allocate limited resources to meet various responsibilities and patron demands. The strained financial situation for both institutions and students has been a hot topic of concern around the country. In the Fall of 2018, the CARLI Collection Management Committee identified two related areas in which academic libraries have been facing these concerns: textbook reserves and curriculum materials collections. In both instances the focus was on traditional print materials.

Both of these areas directly relate to the following issues:

1. Financial resources and expenditures by both students and libraries.
2. Students need for and use of libraries and library resources.
3. The purpose and role of the collections and the library.

The topic of student success is considered very important by academic faculty and relates to all three topics listed above. The *2019 Textbook Affordability Survey,* released in May 2019, stated that the "issue of textbook affordability is not an idle one: if students are unable to afford textbooks and other required materials, they are likely to underperform or fail to graduate, which can have a negative effect both on the students' ability to succeed and the academic institution" (New York: Library Journal, 2019, p.2). While this report is focused on digital or OER textbook alternatives, some of its observations can apply to print books as well.

In order to address this concern for student success, many libraries have created textbook reserves and curriculum collections in order to provide options for students that might not be able to afford course materials and address the students' educational needs.

The role of teaching faculty in supporting these collections is very important. "While faculty broadly do not rely substantially on the library in designing their undergraduate courses, many faculty have indicated the importance of the library's value towards student success at their college or university. Half of faculty indicated librarians and library staff as highly important in contributing to student success" (Melissa Blankstein and Christine Wolff-Eisenberg, *Ithaka S+R US Faculty Survey 2018* (NY: Ithaka S+R, 2019), p.62. https://sr.ithaka.org/wp-content/uploads/2019/03/SR-Report-US-Faculty-Survey-2018-04122019.pdf). So, providing these two collections does directly support student success, although it cannot be quantified.

To try to understand how Illinois academic libraries are handling these issues, the committee surveyed CARLI members. The responses highlighted how different the situations were at all institutions, with various factors having differing importance for each institution. High prices were the most common factor that impacted a library's decision regarding textbook reserve programs.

Methodology

After identification of the two topics and the decision to use one survey to gather information on both topics, the Committee formulated questions and discussed survey logic progression. The SurveyMonkey platform was used to build the survey.

The survey was sent to 128 CARLI governing members, and 68 responses were received (53%). In some cases, the lack of response may be attributed to the fact that some CARLI members have neither collection because they are more research than academic focused; however, the survey introduction did ask all members to reply regardless of institution type. Duplicate responses were removed. The entire survey responses are included in the appendices to this report with all institutional identifiable information removed.

After reviewing the responses, the committee observed that there seemed to be some confusion among the respondents about the textbook portion of the survey. With the advantage of hindsight, the Committee felt that better explanation of the purpose of the survey and definition of terms was needed. Some of the questions needed more clarity and explicitly in order to get more complete answers.

Textbook Reserves

For the purposes of this project, textbooks are books on specific subject matter that are required for academic courses. They are not something that people commonly own or which libraries commonly purchase for general circulation. The focus of this survey was on print materials; eTextbooks may help alleviate costs for students and libraries, but pose a different set of questions for libraries, and, therefore, were not included.

The Committee was interested in learning what systematic process libraries had for running a textbook reserves program, but realized, belatedly, that this was not fully explained in the survey. A majority of the respondents have some kind of system in place (40 out of 68, 58%), but most operations are not as formalized as the Committee imagined with many programs depending on faculty donations for these collections.

When CARLI libraries add textbooks to reserve collections, the most common way that texts were identified was information provided from their faculty (n=29, 73%), other methods to gather this data was information from their campus bookstore, and in some cases via academic services or another administrative department.

The aforementioned *2019 Textbook Affordability Survey Report* from Library Journal, on the other hand, does not even mention textbook reserves as a possible alternative and further reports that the majority of faculty apparently do not work with their libraries to reduce textbook costs (p.4). This discrepancy leads one to wonder if other institutions who do not use faculty as a resource for textbook selection should reach out to their faculty and build these relationships to further improve this service provided for students.

As mentioned earlier, at some institutions, the campus bookstore provides the library a list of required textbooks, and the library then selects which items to acquire. However, cooperative arrangements with bookstores were associated with a minority of the respondents with 12 out of 39 respondents (30%) noting this arrangement. The survey indicates that some libraries must have staff determine the required texts from various campus information sources, and then decide what to acquire. This labor-intensive process might explain why some libraries responded that insufficient staff resources were a reason that they did not have a textbook reserve program.

A majority of libraries (n=22, 56%) indicated that they purchase textbooks from their general monographic fund, 4 libraries use a dedicated fund, while the rest use other methods. 26 out of 37 respondents (70%) indicated that there is no price limit for purchasing textbooks, which would imply that those institutions feel that providing a textbook is very important. While this is directly supporting students, it does negatively impact other parts of the collection budget. What is not known is if those institutions acquire every required textbook or if they only get those textbooks that are judged to be the most important (the latter process would seem to be the most logical use of funds). 28 out of 37 respondents (76%) indicated that they are selective as to what they acquire for textbook reserves. As textbook prices increase, utilizing funds for this purpose means that there are less funds available for purchasing a wider variety of materials that would support a wider variety of courses and student needs.

One issue that libraries have to consider is the fact that many textbooks now come with a unique electronic access code that provides an individual student with access to online content that are directly utilized within a course (assignments, tests and quizzes, readings). If a library acquires such a textbook, only one user could have access to that online content; for some libraries, this would be a reason not to acquire the textbook. On the other hand, some libraries may decide that at least having the textbook available - minus the electronic access code - is still a useful service to provide for students.

The primary reason noted for either not having a textbook reserves operation or having a limited operation is the cost of textbooks (as expected). The second main reason for not having a textbook reserves operation was the lack of space to house this type of collection. Most libraries that have a textbook reserves section locate it behind or very close to the access services/circulation desk (n=36, 90%), but this specific area can be small, cramped, and busy with staff trying to perform multiple services at the same time in the same space. A few libraries have reserve books available for easy, open access by

patrons (n=3, 8%). The third reason mentioned for not having a Textbook Reserves operation is that the process it is complex and time consuming, and that there is not enough staff available to handle it. This could also explain why some libraries operate a very limited textbook reserve program.

Additional Observations

- For those libraries that indicated that their library did not have a textbook reserve program when asked if they were planning to or wanted to establish such a program, 28 libraries responded with 17 (61%) indicating that they did not and 11 (39%) indicated that they were planning to or would like to create a textbook reserve program.

- Some libraries do have a textbook reserves section separate from a course reserves section (13 out of 40 responses, 33%), while most (n=27, 67%) do not make a special distinction and, instead, incorporate the textbooks with the other materials on reserve for courses.

- Most academic institutions consider it the responsibility of students to purchase their textbooks. Some institutions have a textbook rental program, which does cut down on student costs. Some institutions automatically include the textbook purchases into the tuition cost of each course, which somewhat obscures the cost of the textbooks. These two options do make it easier for students to get their required textbooks and decrease the demand for a library to have course textbooks on reserve. But, there are always students who, for whatever reason, do not have a print textbook available when they need to use it. These students often look to the library for help, which is why some kind of textbook reserves program is so valuable.

- The role of the campus bookstore is very important in such operations. Of those libraries that do purchase course textbooks, many of them purchase directly from the campus bookstore as this is frequently faster than going to an outside source.

- Some library collection development policies may not address the issue of course textbooks as 14 out of the 40 responses to this question indicated their policy did not (35%), while 20 libraries (50%) did say that their policy did include information specific to textbooks. While not vital to library operations, the libraries that do not mention textbooks might address this issue within their policy, so the library's collection development priorities are clear for all.

- Because the use of course textbooks is intended for the students of one specific institution, resource sharing of current textbooks among libraries is not a viable option except for older editions in the circulating collections. This fact makes OER or consortial textbook editions attractive for all institutions.

- Most institutions allow textbooks to be checked out for a limited time (e.g., two hours) (n=21, 55%) to allow access to the content to the greatest number of students.

- Relatively few libraries had textbooks for every course (n=13, 32%) or multiple copies.

Curriculum Materials

Many institutions previously had separate curriculum materials collections (sometimes called educational resources laboratories or instructional materials collections or centers), but demand for these specialized materials has decreased, primarily as more materials are made available online. Some libraries have discontinued this special collection - discarding some items and incorporating others into the general circulating or course reserves collections. Unfortunately, a question asking if a library had a separate location for curriculum materials was not included in our survey.

Of the total 67 respondents to the curriculum materials portion of the survey, 34 reported having curriculum materials such as K-12 textbooks, manipulatives, and/or student activity manuals. Of these, 9 institutions indicated they have a dedicated budget for these materials. 7 respondents indicated a budget between $1 - $4,999, while 2 respondents have budgets of $10,000+ for these materials. Based on this, we can conclude that the majority of libraries purchase curriculum materials from a general collection fund.

Over half of the respondents (n=21) are still actively adding curriculum materials to their collections, however, one of these institutions plans to discontinue this practice in the near future. Of the 15 respondents that are no longer adding these materials or are planning to stop, there were a number of reasons indicated. These reasons included usage of open educational resources, budget restraints, and decreased usage of the materials. Although many respondents indicated that these materials are being used less frequently, an interesting outlier indicated that "curriculum materials are one of the most utilized sections of our library collection by undergraduates in the traditional and adult degree completion education programs." Librarians wanting to rejuvenate their curriculum materials center may want to review the article by Melissa Correll and Jodi Bornstein, "Collaboration at the Center: Librarian, Faculty, and Students Partner to Revive Their Curriculum Lab**",** *Pennsylvania Libraries: Research & Practice*, Spring 2017, Vol. 6 Issue 1, p39-48.

Users of curriculum materials are largely reported as undergraduate and graduate students in education related programs. Nearly half of respondents (15 of 32) indicated that these materials are used for lesson and curriculum planning. Though the target patrons of these materials are education students and faculty, several respondents noted that these collections are available to any patron groups including community members. There was a range of answers on the circulating policies of these materials, including availability through in-library use only, local circulation, and interlibrary loan. There was also a variety of notes on loan periods, ranging from 2-hour and overnight to consistency with loan periods of general stacks items. In retrospect, a question clearly asking about lending policies regarding loan periods and interlibrary loan would have been helpful addition to the survey. The question addressing usage was an open response field, and some respondents addressed some of these topics, but not all.

There are challenges to lending curriculum materials, of which respondents noted that the multi-part nature of these materials being the most consistent barrier. Issues discussed in the survey included the time-consuming nature of tracking the parts and having a "knowledgeable person" count returned items. Another issue is that multiple individuals might need access to the same materials for course use. Other concerns included:

- Knowledge of what local school districts are using for curriculum materials
- Restricted access to these materials (e.g. items in locked cabinets)
- Local practices regarding call numbering systems for these materials
- Challenges of the format (e.g. fragility of boxed kits going through interlibrary loan).

Unlike the survey questions on textbook reserve programs, respondents seemed clear on what comprised curriculum materials in this survey. In FY2016, the Committee began work on collaborative purchasing for curriculum materials that continued for two annual projects. In this survey, a respondent noted their participation in a collaborative purchase proved there was some interest and need for these materials after an instructor asked about one of the purchased titles. The committee found that there were challenges in getting consortial participation in the purchasing of the identified titles. This could be attributed to the high cost of these materials, but also could be due to a decline in the acquisitions of curriculum materials as evidenced by responses to this survey. One respondent to the survey noted that a possible having a list of required curricula used by public schools that could be available online as a LibGuide or other resource

would be beneficial. However, creating a list of possible collaborative curriculum material purchases during the past two annual projects proved challenging for committee members involved in that project. Many schools did not reply to email requests for curriculum information, others changed their curriculum regularly, and some reported online resources are not friendly formats for collaborative library purchase. Despite these challenges, this could be an area for a future group to investigate.

Conclusion

This survey provided an overview of how some Illinois academic libraries are dealing with the issues of Textbook Reserves and Curriculum Materials collections. Providing textbook support has become a library issue because of their expense and the broader, immediate student demand for these materials. For traditional educational curriculum materials collection with specialized content, many libraries have changed their collection focus due to changes in the use of the collection. Administrators and teaching faculty need to understand the importance of these collections for their institutional and departmental goals and objectives; their support is vital for libraries to offer these important resources to students.

The role, size, and nature of both the textbook reserves and curriculum materials collections will continue to evolve over time. The balancing of financial, personnel, and spatial resources within specific institutional constraints is a complicated process. But the role and responsibility of the library to support student retention and academic success by providing access to needed information in various formats remains constant. Therefore, this committee strongly recommends the maintenance of these two kinds of programs wherever possible.

Future Considerations

To ease the strain on collection budgets, libraries need to investigate alternative ways of acquiring these specialized materials. One library noted that they get textbooks for reserve from the academic divisions.

Academic libraries need to establish good relationships with campus bookstores so that the bookstore can keep the libraries informed of the various materials that professors want their students to purchase for a course. This can help the libraries determine if an item needs to be acquired for its collection. Better relations could also lead to improved processes for the library to purchase materials from the bookstore.

Those libraries thinking about establishing a textbook reserves program should review this article: Renee LeBeau-Ford and Joanna Ewing, "The Good and the Bad: Implementing a Textbook Reserve Program." *Textbooks in Academic Libraries: Selection, Circulation, and Assessment*, ed. Chris Diaz (Chicago: American Library Association, 2017), pp.33-47. Other articles in that book are useful as well. The committee will consider if some sort of guide to best practices and procedures would be useful for CARLI institutions.

The survey results indicated that there are libraries that do not have a collection development policy. A possible item for future action by this committee is to identify how many CARLI libraries do not have a collection development policy or need to update their policy. If the number is significant, the committee may want to consider providing resources to help these libraries develop or update such a policy.

The Committee may want to study how eTextbooks are being managed within academic libraries, as the use of this particular format should grow in the future.

CARLI does have an Open Educational Resources (OER) initiative (https://www.carli.illinois.edu/governance/committee-directory/comm?comm_id=57&constit=no&dates=no) . There were comments that libraries are hoping

for an expansion of OER to replace the expensive textbooks or curriculum materials that they purchase to support their students. Some institutions are investigating on their own how to approach this issue. Again, faculty are vital to the success of this alternative. CARLI should continue to encourage Illinois academic institutions to develop or make available such resources, as well as make sure that full bibliographic records for these items are in the I-SHARE catalog. Librarians may also benefit from reviewing the chapters in *Affordable Course Materials: Electronic Textbooks and Open Educational Resources,* ed. Chris Diaz (Chicago: American Library Association, 2017).

It might be useful to conduct a similar survey in five years, to evaluate how things have changed for CARLI institutions in the intervening period with regard to these two issues.

The Committee thanks the CARLI members who responded to the survey and encourages Illinois libraries to do what they can to help students meet their continuing needs for textbooks and curriculum materials.

Suggested Future Projects

Open Access eBook Collection Pilot Project

During the 2019-2020 committee year, the OA subcommittee will consider evaluating additional OA collections to add to the consortial catalog. The number and timeline of such additions will be dependent on CARLI staff's ability to do so in light of the Alma implementation process.

Statistics for Collection Development Webinar Series

In Spring 2021 the committee will present webinars series entitled: "There's a Report That Does That? Using Statistics to Inform Collection Development." These webinars will provide information on how to collect and use statistics that can inform the collection development process. These webinars will include basic information that all CARLI libraries can use as well as data that can be gathered from Alma and various ILL platforms.

Textbooks

The committee might investigate how eTextbooks are handled in libraries and what CARLI might be able to do concerning consortial purchases of eTextbooks and preparing a webpage of best practices for establishing and operating a textbook reserves program.

Collection Development Policy

The committee could survey the consortium about usage of a formal collection development policy. Depending on results, the committee will consider developing a webpage of best practices for creating or updating a formal collection development policy.

2018–2019 CARLI Commercial Products Committee:
Annual Report of Activities

Members:

Lesley Wolfgang, St. John's College of Nursing, Chair
Xiaotian Chen, Bradley University
Edith List, Principia University
Jeff Matlak, Western Illinois University
Mill Midgley, DePaul University/University of Illinois at Chicago
Jim Millhorn, Northern Illinois University
Thane Montaner, Prairie State College
Kavita Mundle, University of Illinois at Chicago
Amanda Wiesenhofer, Lincoln Land Community College

Staff liaisons:

Cindy Clennon
Jenny Taylor

Highlights of Activity:

Electronic Resource Proposals
The CPC received 6 proposals in FY19. Of those proposals, four were rejected, one was accepted, and one is pending.

Following the interest survey conducted in FY18, the committee worked on agreements with two additional vendors, Bloomsbury and Films on Demand.

CARLI also finalized an offer of additional content from the American Mathematical Society. The committee participated in the discussions about this offer, which began in FY18.

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

The presentations included:

Keynotes:

Role of Usage Statistics in the Library Value Proposition
Dennis Krieb (Lewis & Clark Community College)

Future Plans for Usage Statistics in Streaming Video Resources
David Parker (ProQuest)

Panel:

Tools and Practices used in Collecting Usage Statistics and how it Shapes Collection Decisions
CORAL – Southern Illinois University Carbondale
LibInsight – Chicago State University
MS Access & INTOTA – Principia College

Presentations:

Streaming Video Resources in Libraries
Jumping into the Stream: Kanopy – Chicago State University
Consortia Manager
CARLI

VPAT Project

An additional project undertaken by the committee was the creation of a VPAT repository within CARLI's website. VPAT documents, or Voluntary Product Assessment Templates, are documents provided by vendors detailing the accessibility of a specific product. Reports were collected and posted on the CARLI website at https://www.carli.illinois.edu/vpat-repository and can be used by libraries as they examine the accessibility of electronic subscriptions.

It is the intention of CARLI staff to keep this page up to date as new VPATs are released or are updated.

Consortia Manager

With grant funding from the Illinois State Library, CARLI entered into a subscription for the usage statistics module of Consortia Manager beginning in early CY19. The committee spent time during the year discussing CARLI's planned utilization of the module for usage statistics collection.

2018–2019 CARLI Commercial Products Committee Annual Project:
Creating A Repository VPAT Information

Members:

Lesley Wolfgang, St. John's College of Nursing, Chair
Xiaotian Chen, Bradley University
Edith List, Principia University
Jeff Matlak, Western Illinois University
Mill Midgley, DePaul University/University of Illinois at Chicago
Jim Millhorn, Northern Illinois University
Thane Montaner, Prairie State College
Kavita Mundle, University of Illinois at Chicago
Amanda Wiesenhofer, Lincoln Land Community College

Staff liaisons:

Cindy Clennon
Jenny Taylor

At the suggestion of CARLI Board member Cathy Mayer, the Commercial Products Committee took on the creation of a VPAT repository as their annual project.

Introduction

As stated on the CARLI web page for the VPAT repository, the issue of accessible technology continues to garner attention in all sectors, and the ability to ensure its provision in educational settings is a topic of keen interest among academics, library professionals, and administrators alike. To that end, the CARLI Commercial Products Committee has undertaken a project to collect and make public accessibility documentation from CARLI's electronic resource providers, specifically the vendors' VPAT® information, or Voluntary Product Assessment Template®.

The Information Technology Industry Council (ITI), self-described as the global voice of the tech sector, is the creator of the VPAT®, which is the "recommended reporting format for enhancing industry-customer communications on ICT product and service conformance with relevant accessibility standards and guidelines." The VPAT® can be completed in four editions depending on the standards and/or guidelines under consideration: Web Content Accessibility Guidelines (WCAG) 2.0; Revised Section 508; EN 301 549; and International.

Because completion of the VPAT® is, as the name implies, voluntary, providers may choose not to complete a VPAT® or not to make it available publicly, or to complete it in such a way as to either modulate insufficiencies or detail them fully along with details about future corrections. A procurement official unfamiliar with the product being considered for purchase might not be able to discern from reviewing a VPAT® whether the product is acceptable from an accessibility standpoint. Due to the discretionary nature of the VPAT®, it can be a useful tool in evaluating a product's accessibility, but it should not be the sole determining factor in purchasing decisions.

Process

CARLI staff contacted all current vendors with whom CARLI has license agreements to let them know to anticipate contact from Commercial Products Committee members. Committee members then contacted all of the sales representatives requesting current VPAT information.

One of the challenges with this project was that VPAT information is completed at the product level. The full list of VPAT data is available on the CARLI web site at https://www.carli.illinois.edu/vpat-repository. Here is a list of the vendors for which VPAT information is available on the CARLI web site:

- AAAS (6 products)
- American Chemical Society (5 products)
- American Mathematical Society (2 products)
- ARTstor (1 product)
- Association for Computing Machinery (1 product)
- Chronicle of Higher Education (1 product)
- Credo (7 products)
- Duke University Press (3 products)
- EBSCO (161 products)
- eHRAF (2 products)
- Gale (17 products)
- Johns Hopkins University (5 products)
- JSTOR (37 products)
- Lexis Nexis (1 product)
- Oxford (42 products)
- Ovid (14 products)
- ProQuest (85 products)
- Sage (6 products)
- SpringerNature (63 products)
- Wiley (5 products)

The committee members will continue to work with vendors to keep the VPAT information updated.

2018–2019 CARLI Created Content Committee:
Annual Report of Activities and Annual Projects

Members:

Ellen Corrigan (2014-2020), Eastern Illinois University
Hunt Dunlap (2018-2021), Western Illinois University
Marlee Graser (2017-2020), Southern Illinois University Edwardsville
Colin Koteles (2017-2019), College of DuPage
Tricia Lampron (2017-2020), University of Illinois at Urbana-Champaign
Greer Martin (2019-2021), Loyola University Chicago
Ariana Potter (2018-2019), Lewis University
Matthew Short (2016-2019), Northern Illinois University, **chair**
Angela Yon (2018-2021), Illinois State University

Staff liaisons:

Amy Maroso
Elizabeth Clarage

Introduction

The Created Content Committee (CCC) worked on activities related to two main themes this year: promotion of digital collections and linked data education. Given the present uncertainty of the Digital Asset Management landscape, the committee decided to table a DAMS analysis and focus instead on promotion.

Committee members met by conference call each month to plan activities, discuss progress, and offer feedback, communicating by a group email list between meetings. The committee also maintained collaborative workspace on the CARLI website and on Google Drive.

Promotion of Digital Collections

In September 2018, the Committee drafted and sent out a survey to the CARLI membership to gauge how members are currently using social media to promote their digital collections, and how CCC and CARLI could facilitate these activities. This was distributed to CONTENTdm contacts, digital collections interest group, main CARLI announce list, and in the CARLI newsletter. A total of 67 responses were received from 52 member libraries.

Of the 46 survey respondents who answered the question "What social media platforms does your institution use?" nearly 87% of respondents reported using Facebook, with 30% using Twitter, 24% using Instagram, and 28% using a blog. All other platforms had less than 10% engagement. Tumblr, the platform that CCC previously used for promotion, fared worse than almost any other platform. As for frequency, no library posts daily and few reported posting more than once per week. Most respondents reported using social media to promote digital collections (67% of 46 respondents who answered).

Respondent recommendations fell along two general lines: training and organization. A few suggested that CARLI host workshops run by digital marketing experts, which might include a session on digital storytelling. One respondent was unaware that we had drafted a best practices for promotion, indicating

that more promotion of that guide is needed. Other respondents suggested that CARLI administer a social media platform for the consortium or provide more structure to member library postings through the use of hashtag campaigns. This could also be as simple as providing links to CARLI member social media accounts so that libraries can see what others are doing.

Given usage statistics and the results of this survey, the Committee concluded that CARLI's Tumblr should remain dormant at this time. According to analytics, it does not draw much traffic to CARLI Digital Collections, nor are member libraries using the platform. Instead, the Committee decided to move forward with using the existing CARLI Facebook account to promote members' digital collections, based on survey results suggesting that Facebook is the platform most used for promotion.

Rather than drafting and creating all posts themselves, the committee agreed that it would be desirable to invite the membership to submit their own posts. This reduces the committee's workload, while allowing those member libraries who do not have active social media presences to participate in promotion on social media. These Facebook posts would be used to promote new collections or events related to digital collections, like online exhibits or related symposiums, with 2-3 posts appearing each week. CCC drafted a submission form, which includes formatting guidelines and suggestions, sharing a link to the survey in an announcement that went out with the May newsletter. Three committee members were granted editor permissions on the CARLI Facebook pages, so that they could edit and post these submissions, while the rest of the committee agreed to create posts for a backfile, which would be used to keep the account active in case there are few or no submissions.

It may also be worth pursuing additional promotional training opportunities, whether workshops or webinars, in the next year.

Linked Data Education

The committee also organized a series of three webinars on the topic of linked data.

These included:

Linked Data: The View from 30,000 Feet (February 7, 2019)

Provided an overview of the basic characteristics of linked data, and how it exists on the web. Presenter: Jodi Schneider, Assistant Professor at the School of Information Sciences, University of Illinois at Urbana-Champaign. There were 107 registrants with approximately 64 registrants attended the live session via Adobe Connect, with the session recording and slides subsequently made available on the CARLI website. As of June 2019, the recording had been viewed 79 times.

Linked Data in the Library (February 19, 2019)

Addressed the use of linked data in libraries, with a focus on BIBFRAME and the linked data capabilities of Alma. Presenters: Laura Akerman, co-chair of the IGeLU-ELUNA Linked Open Data Working Group, representing the interests of Ex Libris customers and Jodi Williamschen, Senior Technical Metadata Standards Specialist, the Library of Congress. There were 105 registrants with approximately 57 registrants attended the live session via Adobe Connect, with the session recording and slides subsequently made available on the CARLI website. As of June 2019, the recording had been viewed 27 times.

Linked Data Projects (March 5, 2019)

Discussed two library linked data projects ongoing in CARLI member libraries: the use of Library of Congress linked data for authority reconciliation during a metadata cleanup project, and a digital collection of dime novels that uses linked data for metadata enhancement. Presenters: Greer Martin,

Metadata Technologies Librarian at Loyola University Chicago; Demian Katz, the Director of Library Technology at Villanova University's Falvey Memorial Library and lead developer on the VuFind project; and Matthew Short, the Digital Collections & Metadata Librarian at Northern Illinois University. There were 96 registrants with approximately 53 registrants attended the live session via Adobe Connect, with the session recording and slides subsequently made available on the CARLI website. As of June 2019, the recording had been viewed 17 times.

A feedback survey was sent out after the webinars concluded, which received relatively few responses. Comments focused mostly on technical problems and not on content. Most sessions were generally very well-received.

Summary

- Surveyed CARLI member libraries on their use of social media to promote digital collections.
- Began using the CARLI Facebook page to promote digital collections, developing a form for member libraries to submit content.
- Organized and sponsored a three-part webinar series on linked data, with 5 presentations, six presenters, and a total of 174 registered attendees.

Complete List of Documentation and Webinar Information

CARLI Facebook Page

https://www.facebook.com/CARLIllinois

Google Form for Submitting Facebook Content

https://docs.google.com/forms/d/e/1FAIpQLSdFslZn-ajSsh-sveMPR35gaco4Hxs1-35tBaoqd22qs9sLaQ/formResponse

Linked Data Webinar Series: https://www.carli.illinois.edu/products-services/contentdm/linked_data_2019

> Linked Data: the view from 30,000 feet (Jodi Schneider):
> https://www.youtube.com/embed/J1AWdit_bCY
>
> Linked Data in the Library (Laura Akerman and Jodi Williamschen):
> https://www.youtube.com/embed/KCFExYHGaIo
>
> Linked Data Projects (Greer Martin, Demian Katz, and Matthew Short):
> https://www.youtube.com/embed/-RZHhjy-ncA

2018–2019 CARLI Instruction Committee:
Annual Report of Activities and Annual Projects

Members:

Annie Armstrong, 2018-2021, University of Illinois at Chicago
Amy Hall, 2017-2020, National-Louis University
Tim Lockman, 2018-2021, Kishwaukee College
Molly Mansfield, 2017-2020, Dominican University
Marielle McNeal, 2017-2020, North Park University, Co-Chair
Christina Norton, 2018-2021, Heartland Community College
Matthew Olsen, 2016-2019, Millikin University
Mackenzie Salisbury, 2016-2019, School of the Art Institute of Chicago, Co-Chair
Becca Yowler, 2018-2019, Knox College

Staff liaisons:

Debbie Campbell
Lorna Engels

Charge

The committee will identify and address issues of critical concern and best practices for instruction librarians and information literacy programs.

Meetings

The committee held an initial in-person meeting at the CARLI office in Champaign on August 8th, 2018. Subsequent meetings were held by teleconference and took place on the first Wednesday of the month from 1-2:30 pm. The committee also used the instruction@carli.illinois.edu mailing list and a Google Drive folder to share information and documents outside of meeting times.

Theme

The committee's theme for this year was "Inclusive Classroom: Cultivating learning environments for students with diverse identities." Through this theme the committee hoped to investigate ways that academic librarians can create inclusive learning environments in the classroom and in the library in order to create a climate in which all participants are fully engaged, equally valued, and are open to diverse perspectives. In order to explore this theme the committee planned a series of webinars to learn about others practices in creating inclusive classrooms. The committee also carried this theme into the Instruction Showcase in both the call for proposals and a keynote workshop, created and led by Kellee Warren from the University of Illinois at Chicago, which looked to the education literature on how to cultivate a self-reflexive practice.

Webinars

On February 13th, Annette Alvarado, a Reference and Instruction Librarian at Loyola University Chicago Libraries, liaison for Arrupe College, presented the webinar "Intrusive Librarianship". This webinar discussed Arrupe College, offering a two year associate's degree program, structured for students that needed academic support. These students come from diverse populations, and many are low-income, first-generation college students. Intrusive Advising, also known as proactive advising, has been instituted by

various educational institutions throughout the United States. At Arrupe College this approach has been adopted to meet the needs of underserved students and has been successful in reaching students that otherwise would not have asked for help. This webinar showcases how Annette Alvarado has put intrusive advising into practice, and has become an intrusive librarian. 65 people registered for this event.

The webinar recording and descriptive outline are available from the CARLI website: https://www.carli.illinois.edu/products-services/pub-serv/instruction/IntrusiveLibrarianship-Alvarado

On March 12, Robin Harris, Michelle Oh, and Alyssa Vincent, all librarians from Northeastern Illinois University (NEIU), presented the webinar, "A work in process: Cultivating inclusive classrooms." NEIU is home to one of the most diverse campuses in the country and includes students from every ethnic and socioeconomic background, as well as many first generation and returning adult students. In this webinar the presenters shared their missteps, lessons learned, and overall experiences with library instruction and research consultations while working with a diverse student population. 89 people registered for this event.

The webinar recording and descriptive outline are available from the CARLI website: https://www.carli.illinois.edu/products-services/pub-serv/instruction/WorkInProcess-HarrisOhVincent

Additional Instruction Centered Activities

Twitter Chats

During the past year the committee applied its collective instruction expertise to several new projects. One new avenue was hosting a Twitter Chat that was open to all, using the hashtag #InclusiveInfoLit . The committee created the questions to ask the participants before the chat, all reflecting this year's theme. On December 7th, we held the first discussion which was well attended and generated interesting discussion. The discussion was archived using Wakelet and a short survey was open to participants as a way to gauge overall demographics and success. The survey showed that people were engaged with the topic and conversation, and many were from outside of the state of Illinois (about 75%).

The survey also showed a desire to continue the discussion, so on April 19th the committee held a second Twitter Chat. Overall the committee agreed that this was an interesting new way to connect and share ideas with others on and about Instruction. Additionally, a list of resources mentioned or discussed in these chats was gathered and shared for reference. All of the materials from these chats, including the archive, survey, promotional materials, questions, and reference list is saved in the committee's shared folder for future reference.

IPA's (Inclusive Pedagogical Activities): Collaboration with The Library Sessions Podcast

The Library Sessions [https://thelibrarysessions.wordpress.com/] is a podcast about teaching and learning in the library and beyond. It is the brainchild of librarians Martinique Hallerduff (Dominican University) and Jennifer Lau-Bond (Oakton Community College and Harper College), who combined have almost two and a half decades experience teaching in and outside of the library. They mainly talk about teaching and instruction and sometimes wander to other library-related topics.

This subseries of Library Sessions, The IPA's (Inclusive Pedagogical Activities), is a collaboration between these podcast hosts and the CARLI Instruction Committee. These episodes are about highlighting and discovering the ways in which librarians and educators have been working on creating these important approaches. Each episode looks at a specific lens in which we talk about Inclusion, such as Diverse Identities, Accessibility, and the Economics of Open Educational Resources. Check out Season 3 episodes 2-5 to hear this subseries.

Instruction Showcase

The committee held the seventh annual Instruction Showcase on Thursday, May 23, 2019 from 9:30am to 3:15pm at North Park University. The morning programming of this year's Showcase included a keynote workshop "No Shortcuts: Culturally Sustaining Pedagogy in Library Instruction and a Self-Reflexive Practice" created and facilitated by Kellee Warren from University of Illinois at Chicago. This workshop looked to the education literature on how to cultivate a self-reflexive practice. After a brief presentation on culturally sustaining pedagogy, we reflected on a series of prompts, and then reported out to our colleagues which included a lively Q+A session with the presenter.

After the workshop, we hosted "Podcasting with the Pros: Q+A with the Library Sessions Podcast" in which the Library Session Podcast creators, Martinique Hallerduff and Jennifer Lau-Bond talked to our attendees about how this podcast came to be and the IPA collaboration as well as their best practices/lessons learned. The hosts also took questions from the audience about marketing as well as technology. The hosts were also kind enough to supply attendees with a list of references for the tools they use, found at https://thelibrarysessions.wordpress.com/podcasting-resources/.

In the afternoon, we had 5 presentations from colleagues that demonstrated instruction techniques and tools that are designed to enhance library instruction, with some presentations drawing inspiration from the committee's theme this year, "Inclusive Classrooms: Cultivating Learning Environments for Students with Diverse Identities." This year we had 68 people registered for this event.

Respectfully Submitted by
Marielle McNeal and Mackenzie Salisbury
Co-chairs, 2018-2019

2018–2019 CARLI Preservation Committee: Annual Report of Activities

Members:

Mary Burns, 2017-2020, Northern Illinois University, Co-Chair
Nora Gabor, 2018-2021, DePaul University
Tonia Grafakos, 2018-2021, Northwestern University
Susan Howell, 2017-2020, Southern Illinois University Carbondale
Emma Lincoln, 2017-2019, Augustana College
Ann Lindsey, 2017-2020, University of Chicago, Co-Chair
Bonnie Parr, 2016-2019, Abraham Lincoln Presidential Library and Museum
Meghan Ryan, 2016-2019, National Louis University
William Schlaack, 2018-2021, University of Illinois at Urbana-Champaign

Staff Liaisons:

Elizabeth Clarage
Nicole Swanson

Meetings:

The Preservation Committee met 11 times during 2018-2019:
1 in-person meeting August 16, 2018: CARLI Office, Champaign
10 conference calls: September 11, October 10, November 14, and December 10, 2018; January 14, February 11, March 11, April 8, May 13, and June 10, 2019

Activities:

- Maintained and updated the Preservation Resources webpage:
- https://www.carli.illinois.edu/products-services/collections-management/preservation-resources
- The 2018-2019 Annual Project was "Beyond the Book: Preserving your Non-Book Collections." This theme was developed in the following CARLI Newsletter Preservation Tips:
  - "Project Overview," Ann Lindsey, The University of Chicago Library
    https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book
  - "Board Games and Materials with Multiple Parts," Nora Gabor, DePaul University
    https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-board-games
  - "Maps and Blueprints," Susan Howell, Southern Illinois University Carbondale and William Schlaack, University of Illinois at Urbana-Champaign
    https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-maps-and-blueprints
  - "Microfilm," Ann Lindsey, The University of Chicago Library and William Schlaack, University of Illinois at Urbana-Champaign
    https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-microfilm
  - "Paintings," Tonia Grafakos, Northwestern University

https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-paintings
- o "Photographs—General Overview," Meghan Ryan, National Louis University https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-photographs-general-overview
- o "Photographs—Glass Plate Images," Emma Saito Lincoln, Augustana College https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-photographs-glass-plate-images
- o "Scrapbooks," Mary Burns, Northern Illinois University and Meghan Ryan, National Louis University https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-scrapbooks
- o "Textiles," Emma Saito Lincoln, Augustana College https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-textiles
- o "Project Summary," Mary Burns, Northern Illinois University
  - ▪ https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book-project-summary
- Another newsletter article contributed by the Committee included:
  - o "Preservation Week, April 21-27, 2019," Ann Lindsey, The University of Chicago Library
- Forthcoming newsletter articles will be contributed by Committee members:
  - o "Summary of Workshop, Choosing and Constructing Protective Enclosures for Library Materials, May 8, 2019"
  - o "Summary of Open Houses at the Illinois State Military Museum and the Abraham Lincoln Presidential Library and Museum, June 7, 2019"
- Sponsored a hands-on preservation workshop titled, "Choosing and Constructing Protective Enclosures for Library Materials," on May 8, 2019 with 29 registrants. The workshop supplies were sponsored by University Products: https://www.carli.illinois.edu/products-services/collections-management/preservation-resources under Past Webinars & Events
- Mary Burns presented a report on the Committee's 2017-2018 Annual Project, "Communicating the Value of Preservation," at the CARLI Annual Meeting on November 2, 2018.
- Forthcoming: Sponsor an Open House at the Illinois State Military Museum and the Abraham Lincoln Presidential Library and Museum, June 7, 2019.

Future activities:

- Plan a workshop on advanced repair techniques, tentatively slated for Spring 2020.
- Continue to contribute Preservation Tips to the CARLI newsletter.
- Maintain the CARLI Preservation Resources Webliography, https://www.carli.illinois.edu/products-services/collections-management/preservation-resources
- Develop a new Annual Project on a preservation topic for 2019-2020.

Submitted by co-chairs Mary Burns and Ann Lindsey, May 29, 2019.

2018–2019 CARLI Preservation Committee Annual Project:
Beyond the Book: Preserving Your Non-Book Collection
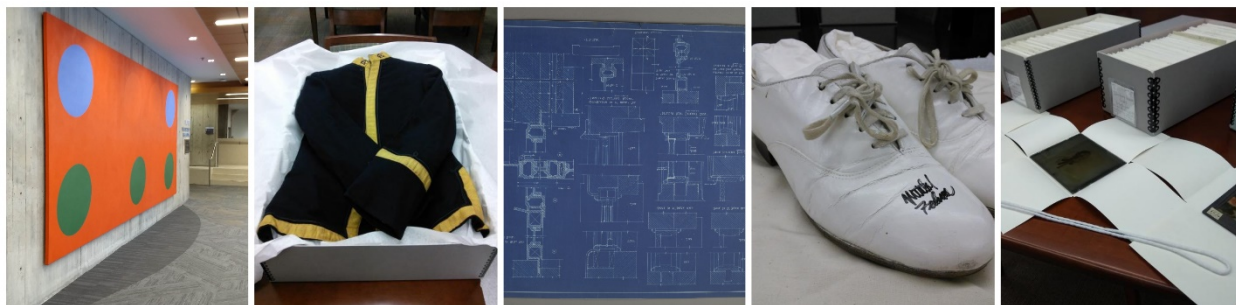
Most libraries contain collections that consist primarily of bound volumes and archival papers. The steps for preserving these items are fairly well documented, and we all try to the best of our abilities to care for our collections. Those of us who are new to the field can readily find information about preserving these materials. And those of us who are veterans try to keep up with new techniques and findings. It's a fairly well-worn path. But what do you do when you encounter something off of this beaten path? What do you do about the unusual things in your collections? We all have them. They might be statues or medals, costumes or hats, ceramics, board games, or even food items. They might also be large collections of glass plate negatives or scrapbooks. What environmental conditions do these items require? Do they need special handling or housing? In short, how do you care for the non-book items in your collection?

Throughout the 2018-2019 academic year the CARLI Preservation Committee wrote a series of preservation articles which were shared in the *CARLI Newsletter* as Preservation Tips. Each article focused on an unusual item or group of similar items that you might encounter in your collection.

Each author recounted their own story about an unusual item they have encountered in their collection, the challenges these items presented, and how they ultimately decided to best preserve that item or items. Where it is relevant, they will also provide places to find more information or best practices. The more we know about how to preserve non-book items, the better our decision making can be.

Articles included:

- "Project Overview" and "Project Summary" incorporated on the Project Home Page
- "Board Games and Materials with Multiple Parts"
- "Maps and Blueprints"
- "Microfilm"
- "Paintings"
- "Photographs – General Overview"
- "Photographs – Glass Plate Images"
- "Scrapbooks"
- "Textiles"

This series culminated in the creation of a webpage on CARLI's website called *Beyond the Book: Preserving your Non-Book Collections* at

https://www.carli.illinois.edu/products-services/collections-management/beyond-the-book

Article Highlights on the Project Home Page

↱ Board Games and Materials with Multiple Parts

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

↗ Maps and Blueprints

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

↗ Microfilm

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

↗ Paintings

Many libraries own paintings that may be part of a collection, a donation, or part of the institution's history. Some of the preservation concerns are the same as for other library materials such as providing a stable environment without fluctuating temperatures and humidity. Paintings present their own unique set of challenges because they are hung in public spaces and may be difficult to store. This article demonstrates how some of these challenges were met for the painting Matrix by artist Oli Sihvonen. Tonia Grafakos, Marie A. Quinlan Director of Preservation, Northwestern University.

➜ Photographs – General Overview

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

➜ Photographs – Glass Plate Images

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

➜ Scrapbooks

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

➜ Textiles

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

Full Article Sample "Photographs – Glass Plate Images"

Beyond the Book: Photographs – Glass Plate Images

Emma Saito Lincoln, Special Collections Librarian, Augustana College

Among the myriad types of photographic materials you may have in your collections, the category that strikes many as the most intimidating to identify and care for might be glass plate images. For one thing, the terminology commonly used to refer to these types of images can be confusing. You may have heard any or all of the following in reference to these types of materials: glass plate negative, wet plate (with or without the word collodion), dry plate (with or without the word gelatin), glass slide, lantern slide (with or without the word magic), Autochrome.

The catch-all phrase "glass plate images" is used here as an umbrella term that includes all images on a glass base. Those images may be negative or positive, and may be black and white or color. While it is interesting and important to learn how to identify the various photographic processes by which these materials were created, your general approach to their preservation will be the same regardless of the specific type of glass plate image.

Three examples of different types of glass plate images in the Augustana College Special Collections. On the left is a black and white positive image commonly known as a lantern slide, in the middle is a black and white negative, and on the right is a color positive slide.

Certainly, the same general preservation guidelines that apply to all photographic collections also apply to glass plate images. Storage areas should be maintained within the recommended temperature and relative humidity ranges, and should be kept as stable as possible. As with any laminate structure, the cumulative effect of repeated expansion and contraction of the emulsion layer in response to changes in environmental conditions can result in damage. Rather than reiterating the preservation methods that are common to all types of collections, this short piece will focus on some of the preservation needs that are unique to glass plate images.

The main feature of glass plate images that distinguishes them from other photographic materials is the brittleness of the glass base. While glass is for the most part dimensionally stable and chemically inert, it is extremely fragile. Glass is also heavy. These two factors dictate that we approach housing and storage of glass images differently from how we manage our photographic prints on paper or photographic negatives on a plastic film base.

In the Augustana College Special Collections, we have a collection of roughly 8,000 glass plate images created by a prominent local resident in the late 19th and early 20th centuries. We also have smaller quantities of glass plate images in other parts of our collections. Each individual image is housed in a four-flap paper enclosure (acid-free, lignin-free, and unbuffered) before being placed vertically in an appropriately sized archival box. Enclosures are labeled with pencil before the glass plates are placed inside. Any partially filled boxes have spacer boards inserted to maintain the plates in a vertical orientation. When full, even a small shoebox sized box can be quite heavy, and we stack them no more than two boxes high on a shelf.

Individual glass plates are placed inside acid-free, lignin-free, unbuffered four-flap enclosures and then stored vertically inside archival boxes. Each four-flap enclosure is labeled with pencil on the outside before the glass plate is placed inside.

Boxes containing glass plate images are shelved separately from other materials, stacked no more than two boxes high, and have detailed labels to reduce the amount of handling required to locate a specific image.

Future improvements for the preservation of these items include labeling the boxes as "Heavy" or "Fragile" to provide a visual cue to new staff and student workers to use extra caution when handling the boxes. We could also reduce the number of plates per box and distribute corrugated archival board spacers/cushions evenly within each box to lower the weight and reduce the pressure. Some sort of cushioning on the bottom of the boxes would also help to protect the glass plates from impact.

While we do allow patrons to view our glass plate images on a light box in our reading room, a staff member always assists with removing the image from its enclosure and re-housing it after use. We encourage access to digital images scanned from the glass plates whenever possible. This preserves the originals by reducing the frequency with which they are handled, and often serves the needs of the patron more satisfactorily because digital negative images can be easily converted to positive, and it is far easier to zoom in to see details on a high-resolution digital image than it is to hover over a light box with a magnifying glass. Most glass plates were originally intended to be enlarged in some way, either through the printing process or through projection, so viewing a digital "enlargement" is in many ways a more accurate rendering of the intended effect.

For detailed information about the various types of glass plate images, their chemical composition, the processes by which they were created, the time periods when they were in common use, and the types of deterioration specific to each kind of emulsion, please see the sources listed below as well as the sources in the companion article on caring for photographic collections [Elizabeth & Nicole will insert link directly to that articles when it is live on the website].

Resources:

Canadian Conservation Institute (CCI) Notes 16/2, ↗ Care of Black-and-White Photographic Glass Plate Negatives

María Fernanda Valverde: Advanced Residency Program in Photograph Conservation, ↗ Photographic Negatives: Nature and Evolution of Processes. 2005. See especially pp. 9-18.

National Archives and Records Administration, ↗ How do I house glass plate negatives?

Northeast Document Conservation Center (NEDCC), ↗ Preservation 101: Session 5: Care and Handling of Photographs – Glass Supports

Return to ➔ Beyond the Book: Preserving your Non-Book Collections

Preservation Committee Members:
  Mary Burns, 2017-2020, Northern Illinois University, Co-Chair
  Nora Gabor, 2018-2021, DePaul University
  Tonia Grafakos, 2018-2021, Northwestern University
  Susan Howell, 2017-2020, Southern Illinois University Carbondale
  Emma Lincoln, 2017-2019, Augustana College
  Ann Lindsey, 2017-2020, University of Chicago, Co-Chair
  Bonnie Parr, 2016-2019, Abraham Lincoln Presidential Library and Museum
  Meghan Ryan, 2016-2019, National Louis University
  William Schlaack, 2018-2021, University of Illinois at Urbana-Champaign

Staff Liaisons:
  Elizabeth Clarage
  Nicole Swanson

Members:

Rachel Bicicchi, 2018-2019, Millikin University
Marissa Ellermann, 2016-2019, Southern Illinois University Carbondale
Aaron Harwig, 2017-2020, College of DuPage, Co-chair
Chad Kahl, 2018-2021, Illinois State University
Joanna Kolendo, 2016-2019, Chicago State University, Co-chair
Nestor Osorio, 2017-2020, Northern Illinois University
Katherine Sleyko, 2018-2021, Prairie State College
Reina Williams, 2018-2021, Rush University

Mid-Year Committee Change:
Nancy Weichert, 2018-2019, University of Illinois at Springfield

CARLI Staff Liaisons:

Elizabeth Clarage
Denise Green

Meetings:

The Public Services Committee held one in-person meeting and met nine times by conference call.

Activities:

- **Change Is Good: You Go First! Leading Others To and Through Change** – Developed a panel presentation, "The Impact on Public Services During and After Implementing a New Catalog" for the Change Management Program.
- **Annual Project**: Assessment of Public Services in Academic Libraries
  URL: https://www.carli.illinois.edu/products-services/pub-serv/assessment-public-services-academic-libraries

Respectfully submitted,
Members of the 2018-2019 Public Services Committee

Assessment of Public Services in Academic Libraries

Assessment in academic libraries usually conforms to the mission of the institution and the strategic plan (goals and objectives) of the library. Before starting an assessment project, librarians and library staff should have a clear understanding of both the institutional mission and their own strategic plan. Assessment of a library service or collection (also called evaluation) may have many different purposes; for example, an overall assessment of the library may be done to respond to campus programs reviews with specific guidelines put in place by the university's central administration. Internal evaluation of a service in the library may be done to determine its quality, efficiency, needed changes, resources, and/or personnel needs; in this case the assessment is done with guidelines created by the library itself. In addition, assessment may be done in connection with external entities for institutional accreditations, degree program accreditations, institutional internal program reviews, etc.

These are just a few of the possible instances when an assessment may be needed. Therefore, it is important to define the purpose of the assessment and the audience or to whom it is going to be directed.

In practice and from an assessment perspective, some routine data collected in public services are not considered assessment methods because the results are not totally in control of the Library and therefore it is difficult to propose a goal for the outcomes. The number of reference transactions and gate counts are examples of this type of data; however, raw data collected as the two cases in this example can be coupled with user surveys. Thus, reference data supported with a satisfaction user's survey can provide evidence of the quality of the service; similarly, in addition to collecting gate counts a survey about how the space of the library is used will also give evidence of both quantitative and qualitative value. In many cases, it tells a story and is an effective way of presenting results.

We are proposing in this project, simple assessment methods that would not require a lot of technical expertise and at low cost. This method can also be adapted with higher technology devices, apps or software packages when they are available. The major areas typically included in a public services unit of an academic library are: reference, circulation, document delivery, reserve, and space usage. Twenty-three assessment methods are presented; an assessment project can be time-demanding, and staff needs to be trained and supervised, also each assessment method requires a schedule (when it will be done), the unit responsible and the staff involved. A staggered schedule that would span for three or four years is recommended; therefore, not every method is done every year. Finally, the most appropriate staff members are expected to summarize and analyze the results as well as to propose changes or improvements. In this way the assessment cycle is concluded.

In this project, the CARLI Public Services Committee presents a number of ideas, tools, and examples for the assessment of the units of a typical public services division of an academic library. This project includes the following sections:

- Standards for Public Services developed by library associations.

- Articles, book chapters, and web pages presenting practical and successful evaluation practices.

- Recently published books on assessment, focused on those which take a practical approach. The table of contents of each item is included to facilitate a quick understanding of their content coverage.

- Assessment methods, including a number of assessments for public services units that can be adapted and modified to specific library's environment.

This set of ideas, tools and recommendations are geared towards academic libraries with limited time and resources needed to start an assessment project.

We would like to recognize the following entities from which permissions to use materials were obtained: American Library Association; Columbia University Libraries; Council on Library and Information Resources, CLIR; Junior Tidal, New York City College of Technology Library; Massachusetts Institute of Technology, University Libraries; Nestor L. Osorio; Northern Illinois University Libraries; and University of Oklahoma University Libraries.

PRODUCTS & SERVICES / PUBLIC SERVICES / ASSESSMENT OF PUBLIC SERVICES IN ACADEMIC LIBRARIES

PS Public Services

Assessment of Public Services in Academic Libraries

▼ Assessment Methods

▼ Circulation Unit Assessments

Assessment Title: Web page for Circulation - Design

Description: This assessment measures the ease of navigation and the practical value of its content.Tools for performing a Focus Group are presented. In addition, organization and aesthetic aspects of the website are reviewed.Tools for performing a Focus Group are presented. In addition, organization and aesthetic aspects of the website are reviewed.

Tools, Instrument: see 📄 Index of Assessment Tools, Instrument 9

Additional Information: There are numerous articles and books about how to effectively design and manage a focus group in a library setting

Assessment Title: Reference Services at Circulation

Description: Collect data of reference transactions at the circulation desk.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 10 – a modified form of Instrument 2

Assessment Title: Laptop Usage Survey

Description: A survey taken by users to determine their satisfaction with the service.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 11

Additional Information: In addition to usage data, this survey will provide qualitative data.

Assessment Title: Circulation: Turnaround of Shelving

Description: This instrument is designed to collect data to measure the average turnaround time between the time a book is returned (either at desk or at drop box) and when the book returns to the shelf.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 12

Assessment Title: Assessment of Circulation Desk Services

Description: A survey about the quality of services provided by circulation services.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 13

Additional Information: See: Source: Long, D. (2012). "Check This Out": Assessing Customer Service at the Circulation Desk. Journal of Access Services, 9(3), 154–168.

▼ Document Delivery Services Assessment

Assessment Title: Processing Time for Interlibrary Loan Requests

Description: The average time between patron request submission and processing of the request in ILLIAD is monitored. Processing for article requests, loan requests, and average of all requests is examined

Tools, Instrument: Report obtained from ILLIAD.

Assessment Title: Web Page for Document Delivery - Design

Description: This assessment measures the easiness of navigation and the practical value of content on a document delivery website. It also evaluates organization and aesthetics. Tools for performing a focus group are presented, as well.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 17

Additional Information: There are numerous articles and books about how to effectively design and manage a focus group in a library setting.

Assessment Title: Reference Services at Document Delivery

Description: Collect data of reference transactions at the Circulation desk

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 18 – a modified form of Instrument 2

Assessment Title: Annual Count of Borrowing and Lending, and Traffic Report

Description:

Tools, Instrument: This data is provided by ILLIAD and the State Library.

Additional Information: This data can be supported by a users survey. See 📄 Index of Assessment Tools, Instrument 17

▼ General Public Services Assessment

Assessment Title: Public Services Assessment Survey

Description: A survey that can be given to users to determine their level of overall satisfaction with their experience using the services

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 1

▼ Reference Services Assessments

Assessment Title: Reference Desk Services

Description: Sample data at Reference points, taking daily or during some weeks each semester

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 2

Additional Information: Libraries with subscriptions to, for example, LibQUAL+, can generate more complex data sets.

Assessment Title: Reference Interaction Survey

Description: It measures the level of satisfaction of users with the service provided at the Reference Desk.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 3

Additional Information: In addition to the data collected about the number of transactions, this survey provides information about the quality of the transaction as perceived by the users.

Assessment Title: Research Consultations (Not at the Reference desk)

Description: Reference staff members maintain a log of research consultations

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 4

Assessment Title: Outreach/Liaison Activities

Description: Reference staff members maintain a log of outreach activities and presentations (Non BI)

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 5

Assessment Title: Google Analytics, LibGuide Stats

Description: This is report from Google Analytics. It can be used to demonstrate the usage of specific reference databases such as Reference Universe.

Tools, Instrument: Google Analytics

Additional Information: ↗ Chapter 5. Optimizing Google Analytics for LibGuides

Assessment Title: Subject LibGuides Usability Design

Description: This assessment measures the easiness of navigation, along with organization and aesthetics.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 6

Additional Information: The four articles in Instrument 6 provide specific details about how to customize a usability assessment for LibGuides.

Assessment Title: Web Page Content and Design (Main Library Page)

Description: This assessment measures the easiness of navigation and the practical value of web page content, in addition to the organization and aesthetics aspects.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 7

Assessment Title: Services for Students with Disabilities

Description: This is an example of an access and accommodation service. Usage data collected and a satisfaction survey.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 8

▼ Reserves Unit Assessments

Assessment Title: Web Page for Reserve - Design

Description: It measures, in addition to the organization and esthetics aspects, the ease of navigation and the practical value of its content. Tools for performing a focus group are presented.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 14

Additional Information: There are numerous articles and books about how to effectively design and manage a focus group in a library setting.

Assessment Title: Faculty Satisfaction Survey

Description: This assessment gauges satisfaction with Reserves web form/experience and quality of service.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 15

Assessment Title: Data of Traditional and Digital Reserve Items

Description: A description of data for usability assessment from the Council on Library and Information Resources is presented.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 16

▼ Space Utilization

Assessment Title: Survey of Space Utilization

Description: Users provide information about how the space in the Library(s) is used.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 19

Assessment Title: Gate Count

Description: Daily gate count- preferably hourly - is performed routinely or by taking periodic samples.

Tools, Instrument: See 📄 Index of Assessment Tools, Instrument 20

Additional Information: Gate Counts alone are not considered an assessment method but if combined with other instruments such as a space usage survey, they can provide valuable information. There are several methods to capture data, including digital, mechanical, or manual collection. The instrument presented can be adapted to those scenarios.

▼ Library Professional Standards

The Standards articulate expectations for library contributions to institutional effectiveness. This statement found in the introduction of
↗ "Standards for Libraries in Higher Education" a document adopted by the ACRL Board of Directors in October of 2011 - it clearly states the significant value of library standards. In this section we provide a comprehensive list of standards related to functions of public services in academic libraries.

AMERICAN LIBRARY ASSOCIATION

↗ ALA Standards & Guidelines

ASSOCIATION OF COLLEGE & RESEARCH LIBRARIES, (A.C.R.L.), AMERICAN LIBRARY ASSOCIATION

↗ ACRL Guidelines, Standards, and Frameworks

↗ ACRL Proficiencies for Assessment Librarians and Coordinators, American Library Association, January 23, 2017.

↗ Guidelines for University Library Services to Undergraduate Students, American Library Association, September 1, 2006.

LIBRARY USER SURVEY TEMPLATES & HOW-TOS

Website: Library Research Service
LRS free survey templates for programs and events and ways to administer them.

Measuring Quality: ↗ Performance Measurement in Libraries, 2nd revised edition
Book: International Federation of Library Associations and Institutions
Edited by Roswitha Poll & Peter de Boekhorst, the 2nd revised edition was expanded to includes information on public libraries as well as academic.

Project Outcome: Measuring the True Impact of Public Libraries
Website: ↗ Public Library Association
PLA's Project Outcome performance measurement tool along with current offerings, surveys, the ability to compare data, and much more.

↗ Standards for Libraries in Higher Education, American Library Association, August 29, 2006.
International Federation of Library Associations and Institutions (IFLA)

↗ Current IFLA Standards

INTERLIBRARY LOAN

↗ Guidelines for Best Practice in Interlibrary Loan and Document Delivery

↗ International Resource Sharing and Document Delivery: Principles and Guidelines for Procedure (2009 Revision)

↗ IFLA Digital Reference Guidelines (2002)

LITERACY AND READING

↗ Using Research to Promote Literacy and Reading in Libraries: Guidelines for Librarians

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MEDICAL LIBRARY ASSOCIATION (MLA)

↗ MLA Competencies for Lifelong Learning and Professional Success (2017)

↗ Standards for Hospital Libraries (2007)

PUBLIC LIBRARY ASSOCIATION (PLA), AMERICAN LIBRARY ASSOCIATION

↗ Planning & Evaluation, American Library Association, June 16, 2016.

REFERENCE AND USER SERVICES ASSOCIATION (RUSA)

↗ Measuring and Assessing Reference Services and Resources: A Guide

↗ Professional Competencies for Reference and User Services Librarians
[These guidelines can be used to create a user satisfaction survey for reference services]

↗ Reference and User Services Guideline Links by Topic, American Library Association, September 29, 2008.

ELECTRONIC SERVICES

Guidelines for Implementing and Maintaining Virtual Reference Services (2017)

Guidelines for the Introduction of Electronic Information Resources to Users (2006)

INFORMATION LITERACY

Information Literacy Guidelines and Competencies for Undergraduate History Students (2013)

INTERLIBRARY LOAN

Guidelines for Interlibrary Loan Operations Management (2012)

Interlibrary Loan Code for the United States (January 2016) (Includes link to generic ILL form)

Interlibrary Loan Code for the United States Explanatory Supplement (January 2016)

Guidelines for Resource-Sharing Response to Natural and Man-made Disasters (2017)

REFERENCE/INFORMATION SERVICES

New Definition of Reference (2008)

Guidelines for Behavioral Performance of Reference and Information Service Providers (2013)

Guidelines for Business Information Responses (2013)

Guidelines for Cooperative Reference Services (2006)

Health and Medical Reference Guidelines (2015)

Professional Competencies for Reference and User Services Librarians (2017)

SPECIAL LIBRARIES ASSOCIATION (SLA)

Competencies for Information Professionals

▼ Resource List

    ▶ Articles, Book Chapters, and Websites

    ▶ Books

▼ Index of Assessment Tools

INSTRUMENT 1
Public Services User Satisfaction Survey

This survey measures the satisfaction level of user interactions at each of the Public Services desks or service points.
Permission for the use of this material was obtained from Northern Illinois University Libraries.

INSTRUMENT 2
Reference Desk Services Data Sample Form

This tool gathers weekly statistics on reference interactions.
Permission for the use of this material was obtained from Northern Illinois University Libraries.

INSTRUMENT 3
Reference Interaction Survey

This brief evaluation gauges satisfaction of reference service.
Permission for the use of this material was obtained from Northern Illinois University Libraries.

INSTRUMENT 4

📄 **Research Consultations (Mot at the Reference desk) Form**

This form gathers weekly tabulation of reference interactions other than at the traditional reference desk.
Permission for the use of this material was obtained from Nestor L. Osorio.

INSTRUMENT 5

📄 **Outreach/Liaison Activities Rubric**

Qualitative and quantitative queries for library outreach and engagement for both individuals and programs.
Permission for the use of this materials was obtained from the American Library Association.

INSTRUMENT 6

📄 **Subject LibGuides Usability Design**

Four articles with practical applications of methodologies and techniques to evaluate LibGuides usability.

INSTRUMENT 7

📄 **Web page Content and Design** (Main Library Page)

"Usability Testing of a Responsively Designed Library Website" includes three instruments, a screening tool, task scenarios, and responsive design post survey.
Permission for the use of this materials was obtained from Junior Tidal, New York City College of Technology Library.

INSTRUMENT 8

📄 **Services for Students with Disabilities**

Books with adaptable surveys to assess services to users with disabilities.

INSTRUMENT 9

📄 **Web Page for Circulation - Design**

Assessment of the usability of web page design including the evaluation of usefulness, value, and appropriateness of the content.
Permission for the use of this material was obtained from John Wiley & Sons Inc.

INSTRUMENT 10

📄 **Reference Transactions: Circulation Desk**

Form to gather reference interactions at circulation desk.
Permission for the use of this material was obtained from Nestor L. Osorio.

INSTRUMENT 11

📄 **Laptop circulation – Satisfaction Survey**

Evaluation to gauge the satisfaction of laptop computer circulation.
Permission for the use of this material was obtained from Nestor L. Osorio.

INSTRUMENT 12

📄 **Circulation: Turnaround of shelving**

Form to gather information on shelving turnaround time.
Permission for the use of this materials was obtained from Northern Illinois University Libraries.

INSTRUMENT 13

Assessment of Circulation Desk Service

Evaluation of service at library circulation desk.
Permission to use this material was obtained from Columbia University Libraries.

INSTRUMENT 14

Web Page for Reserve Services - Design

Assessment of the usability of web page design including the evaluation of usefulness, value, and appropriateness of the content.
Permission for the use of this material was obtained from John Wiley & Sons Inc.

INSTRUMENT 15

Reserve Satisfaction Survey

Survey instruments that evaluates satisfaction with course reserves operations.
Permission for the use of this materials was obtained from Northern Illinois University Libraries.

INSTRUMENT 16

Data of Traditional and Digital Reserve Items

Data and usage of library course reserve operations.
Permission for the use of this materials was obtained from the Council on Library and Information Resources, CLIR.

INSTRUMENT 17

Web Page for Document Delivery Services - Design

Assessment of the usability of web page design including the evaluation of usefulness, value, and appropriateness of the content.
Permission for the use of this material was obtained from John Wiley & Sons Inc.

INSTRUMENT 18

Reference Transactions: Document Delivery Services

Form to gather reference interactions for document delivery services.
Permission for the use of this materials was obtained from Nestor L. Osorio.

INSTRUMENT 19

Survey of Space Utilization

Two examples of evaluation of library space utilization.
Permission for the use of this materials was obtained from Massachusetts Institute of Technology University Libraries.
Permission for the use of this materials was obtained from the University of Oklahoma University Libraries.

INSTRUMENT 20

Gate Count

Form to count people in library space.
Permission for the use of this materials was obtained from Northern Illinois University Libraries.

Prepared by the 2018-2019 CARLI Public Services Committee: Rachel Bicicchi, Millikin University; Marissa Ellermann, Southern Illinois University Carbondale; Aaron Harwig, College of DuPage (Co-Chair); Chad Kahl, Illinois State University; Joanna Kolendo, Chicago State University (Co-Chair); Nestor L. Osorio, Northern Illinois University; Katherine Sleyko, Prairie State College; Nancy Weichert, University of Illinois at Springfield; Reina Williams, Rush University; Elizabeth Clarage, CARLI Staff Liaison; Denise Green, CARLI Staff Liaison.

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Members

Belinda Cheek, North Central College, 2017-2020, co-chair
Eric Edwards, Illinois State Library, 2016-2019
Kari Garman, Bradley University, 2018-2021
Rand Hartsell, University of Illinois at Urbana-Champaign, 2016-2019
Thomas Mantzakides, Morton College, 2016-2019
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Marcella Nowak, College of DuPage, 2018-2020
Nathan Thebarge, Trinity International University, 2018-2021
Ashtin Trimble, Black Hawk College, 2018-2021

Staff liaisons:

Debbie Campbell
Lorna Engels

The Resource Sharing Committee met in person at the CARLI Office on Thursday, July 26, 2018. Other meetings typically took place via conference call on the third Wednesday of every month (10:00-11:30 AM), with the exception of the November and January meetings, which were each held on the fourth Wednesday of the month, and the May meeting which was held on Tuesday, May 14. No meeting was held in February; the Committee completed their February work through email.

Activities

Fall Resource Sharing Forum at Abraham Lincoln Presidential Library

The committee held an in-person Resource Sharing Forum on Thursday, October 25, 2018 at the Abraham Lincoln Presidential Library in Springfield, IL. We had 47 people registered for the forum.

The morning programming of the forum consisted of a keynote "Torn from their Bindings: An Illinois Book Theft Story" presented by Travis McDade from the University of Illinois at Urbana-Champaign. This presentation focused on examples of material theft from libraries (aka unsanctioned resource sharing) with some warnings for theft prevention, followed by a Q & A. After the keynote, members of the CARLI Resource Sharing Committee demonstrated some resource sharing best practices ranging from dos and don'ts in ILDS packaging, lost item processing, and materials handling.

In the afternoon, we had a presentation by the Illinois State Library on utilizing the statistics available from the ILLINET Interlibrary Loan Traffic Survey. The remainder of the afternoon was comprised of two sets of concurrent breakout sessions, from which attendees could choose one session for each time slot. The topics of those sessions included using open access resources for ILL, correcting multiple active patron barcodes in Voyager, and running statistics and reports as a multi-site library. Each time slot also featured a discussion opportunity that attendees could choose in lieu of a presentation, the first on patron instruction and promotion of ILL and access

services, and the other on wear-and-tear vs. billable damage. As an added bonus, throughout the day, attendees had the opportunity for a guided tour of the library.

The full agenda for the forum, including presentation handouts, is available on the CARLI website: https://www.carli.illinois.edu/ResourceSharingForum2018

Annual Project

For its 2018-2019 annual project, the CARLI Resource Sharing Committee decided to review the Universal Borrowing Standard Consortial policies and suggest possible revisions. The Universal Borrowing standards were fully implemented across the consortium in 2012, and the Committee saw a need to review the policies to make sure they reflected the current requirements of library patrons at CARLI I-Share member institutions.

Committee members reviewed the Universal Borrowing Standardized Policies Chart and narrowed down the full list of standards to those that might merit revision. The Committee put together a survey and then distributed it via the CARLI Resource Sharing email list. In addition to asking for participants' feedback on the proposed changes to the standards, the survey requested participants to provide their contact information for possible follow-up, with the promise that the information would be kept confidential. After analyzing the survey results and some additional Voyager data, Committee members discussed updates to the Universal Borrowing Standard Policy that they would ultimately like to propose to the CARLI Executive Board. After the Committee began its work on this project, the CARLI I-Share Next Task Force selected the Ex Libris Alma system as the replacement to Voyager. While there are some changes to the Universal Standard policies desired by the members, due to the Alma implementation, the Committee has tabled making formal recommendations to the CARLI Board at this time.

Questions sent to the CARLI Resource Sharing email list

- August: Tips for training new student assistants
- September: Best practices for patron records
- November: How libraries handle reserving non-traditional material such as spaces, rooms, or equipment
- December: Library policies for food and drink
- January: Distributed survey on Universal Borrowing policies
- April: How libraries keep up on the maintenance of patron and item records
- May: How libraries accomplish inventory maintenance

Completed Terms

Eric Edwards, Rand Hartsell, and Thomas Mantzakides will rotate off the Committee on June 30, 2019. The Committee will select a new Chair or Co-Chairs at its final meeting of the year, on June 19.

Introduction

For its 2018-2019 annual project, the CARLI Resource Sharing Committee decided to review the Universal Borrowing Standard Consortial policies and suggest possible revisions. The I-Share Universal Borrowing standards were fully implemented across the consortium in 2012, and the Committee saw a need to review the policies to make sure they reflected the current requirements of library patrons at CARLI I-Share member institutions.

Committee members reviewed the Universal Borrowing Standardized Policies Chart and highlighted the specific standards they felt were most in need of updating. After discussing the current UB policies together, the Committee members decided that the most effective way to gather input to inform the Committee's recommendations would be to distribute an electronic survey to the I-Share member libraries. In the process of analyzing the standards, the Committee determined a need to make the survey questions as specific as possible, while avoiding tying the questions to a specific platform, such as Voyager.

After narrowing down the full list of standards to those which might merit revision, the Committee put together a survey and then distributed it via the CARLI Resource Sharing email list. In addition to asking for participants' feedback on the proposed changes to the standards, the survey requested participants to provide their contact information for possible follow-up, with the promise that the information would be kept confidential. Overall, 67 CARLI member libraries responded, with some institutions having more than one staff member respond. The total number of individual responses to the survey was 111, although individual questions had anywhere from 109 to 111 responses. The survey ran from January 17 to February 15, 2019.

CARLI staff liaisons compiled the survey results (see below) and then shared them with the Committee. As shown below, the consensus response for some policies was to keep them the same, while the feedback on other policies suggested that the respondents thought changes were necessary. In view of the latter group of responses, in addition to some Voyager data analysis, Committee members discussed updates to the Universal Borrowing Standard Policy that they would ultimately like to propose to the CARLI Executive Board. After the Committee began its work on this project, the CARLI I-Share Next Task Force selected the Ex Libris Alma system as the replacement to Voyager. While there are some changes to the Universal Standard policies desired by the members, due to the Alma implementation, the Committee has tabled making formal recommendations to the CARLI Board at this time.

Summarized and annotated results from I-Share Standard Policy Survey

On the following pages, you'll find each of the questions the Committee asked the I-Share member libraries, along with a graph showing the tallied responses. Above each graph, the Committee summarizes the results for the question. Below each graph, the Committee has included further analysis, along with sample quotes pulled from the responses received.

1) **Loan period for print materials, such as books, music scores, periodicals, etc. (Currently: 28 days)**

Responses indicate a preference, by a wide margin of 94%, to keep the current loan period of 28 days for print materials.
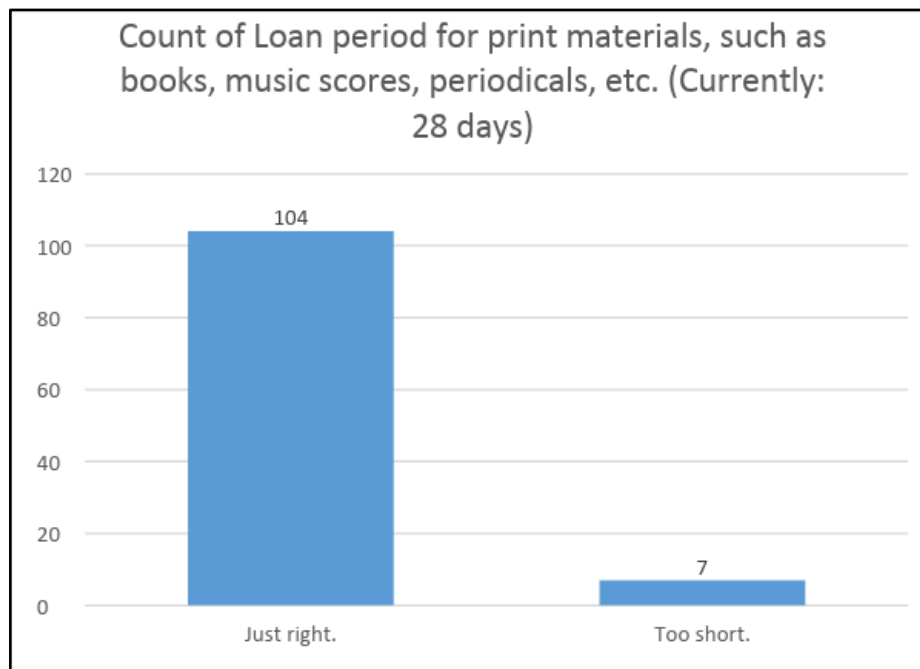

Although only 7 respondents considered the current policy too short, we did get a few comments suggesting a longer check-out period for faculty from some who had selected "just right." The consensus seemed to be that 28 days was fine for students. In fact some of those who wanted a longer check-out period suggested one fewer renewal, so that the total amount allowed would not change considerably.

Sample "Just right" quote: *"This time frame seems to work well for patrons; I have never received any complaints that it is too short or too long."*

Sample "Too short" quote: *"As someone who has dealt with a lot of overdue issues, I think longer would be better, to avoid some of those issues. Maybe 6 weeks (42 days), instead of 4 weeks (28 days). With a longer checkout period, I would suggest 1 less [sic] renewal, so the maximum time would be only 14 days longer."*

2) Loan period for non-print materials, such as videos, cds, microfilm, etc. (Currently: 14 days)

The majority of respondents (65%) are satisfied with the 14-day loan period for non-print items, while only 25% feel it is too short.
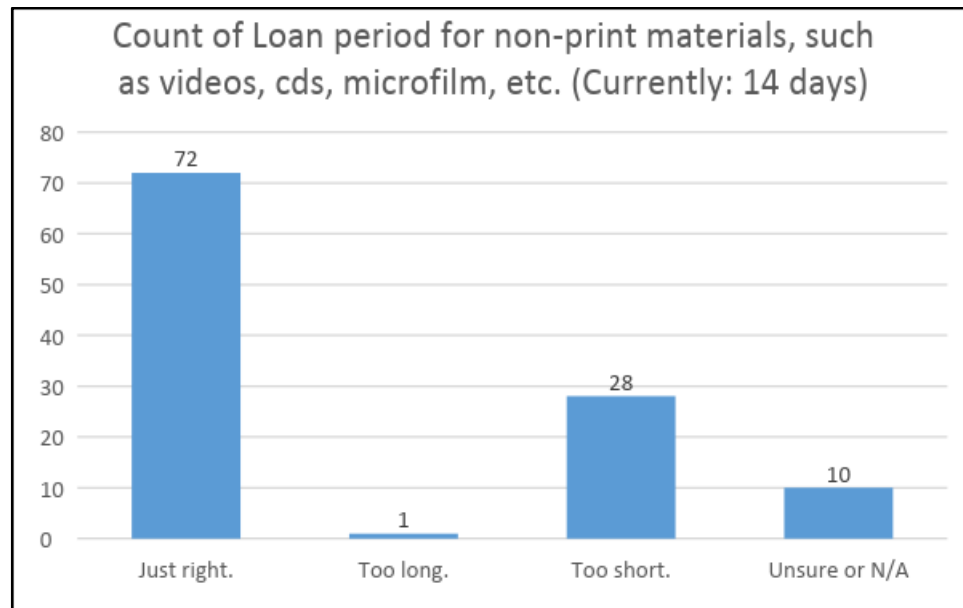

We can see the majority of respondents were happy with the current policy, but, nonetheless, 25% did wish for a longer check-out period. Comments showed that the reasoning was divided between wishing to curb the confusion of different items having varying check-out periods versus a need to use the materials longer. Comments suggest that, in general, the respondents were considering the borrowing of DVDs, even though the question was directed at all non-print materials.

> **Sample "Just right" quote**: *"It's okay, but I wouldn't mine [sic] if it were the same length as print."*

> **Sample "Too short" quote:** *"Especially for movie DVDs, patrons have sometimes commented that they would like to be able to keep them the same length of time as books and other materials (28 days), either because they did not have an opportunity to watch the film or would like to view it again."*

3) Number of renewals for print materials (Currently: 3 renewals for UBReg patrons [typically students and staff] and 6 renewals for UBLong patrons [typically faculty and administrators])

Again, a majority of responses, 70%, indicate that libraries are satisfied with the current number of renewals for print materials, with 19% finding it too many.
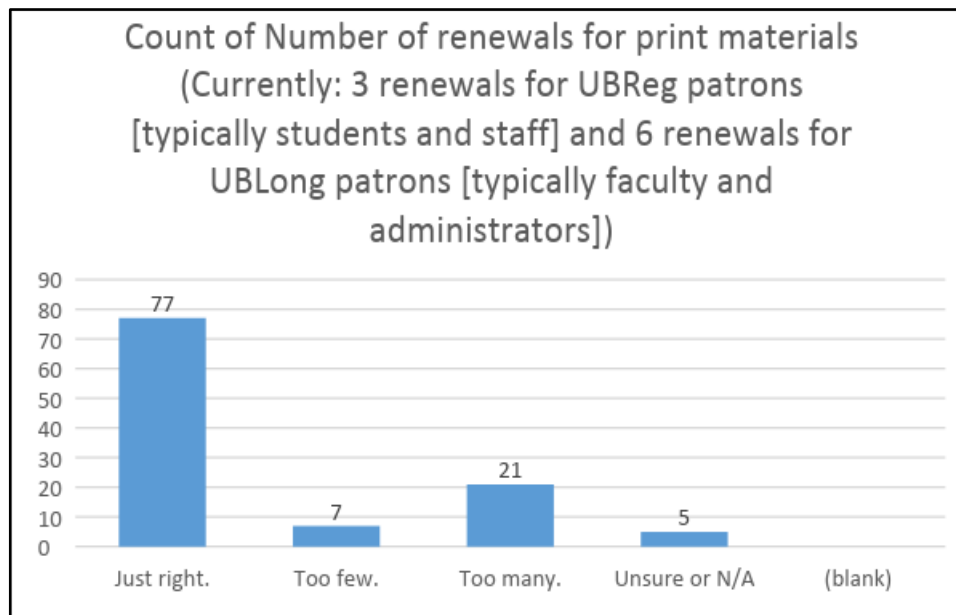
Here again, we see that most respondents were satisfied with the policy as is, although some comments were again left by those choosing "just right." Most of those who would like to see adjustment felt that faculty were given too many renewals. Comments regarding students tended to focus on the checking out of textbooks. A few respondents wanted to see students allowed to check out textbooks for the semester, whereas a higher number took issue with students keeping books for the semester, regardless of items going overdue or to lost, thus depriving others of access to these textbooks.

> **Sample "Just right" quote:** *"Three renewals allow students at universities on quarters or semesters to keep a book long enough to complete an academic term."*
>
> **Sample "Too few" quote**: *"I would move the UBReg renewals to 4 which would allow students to use an item for an entire semester."*
>
> **Sample "Too many" quote**: *"On the one hand, six renewals is a lot; faculty have been known to entirely forget they'd ever requested an item after that long (and so claim it was never checked out). On the other hand, students regularly exhaust their three renewals before the end of the semester and then keep the book while it's overdue so they can keep it through the end of the semester (and sometimes over the winter break as well). Then they're surprised or concerned about the possibility of late fees.*"

4) Should non-print materials be renewable? (Currently: not renewable)

Although these results are closer, the majority of respondents indicate that renewals should be allowed for non-print materials. Here, 52% wished to allow renewals, while 33% were against.
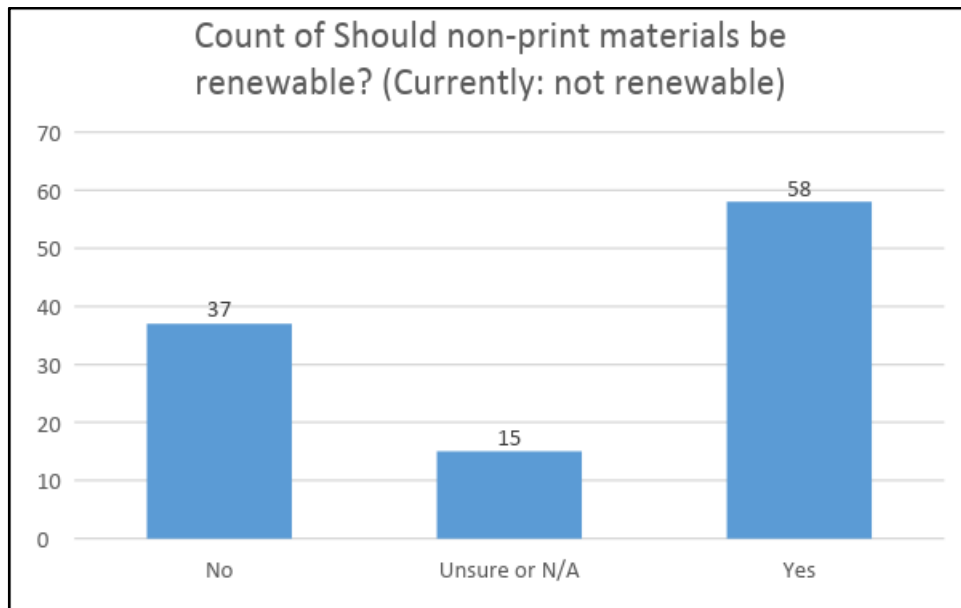

This was the first question where more respondents voted for a change in policy. The majority of comments suggested one renewal for a 14-day period. Many questioned the reasoning behind the policy, suggesting it was a remnant of when A/V materials were quite costly. What was also pointed out, however, was that many libraries do not loan non-print materials through I-Share as it is. The question, then, is whether a change in policy here would result in even less sharing.

Sample "Unsure or N/A" quote: *"It depends on the material itself. I think renewals should be made available, with the option for owning libraries to decline renewals for high-demand items."*

Sample "Yes" quote*: "DVD cases that contain multi disc sets should be eligible for a renewal as opposed to a one disc DVD case. It's sometimes impossible to watch countless hours of a season of a TV show in 2 weeks when work, family and life get in the way."*

5) Total number of overdue I-Share items across consortium before patron is blocked (Currently: 25 overdue I-Share items)

The responses for "Just right" and "Too many" are essentially the same (47% vs. 45%), so further examination would be needed here before any changes were to be recommended.

Count of Total number of overdue I-Share items across consortium before patron is blocked (Currently: 25 overdue I-Share items)
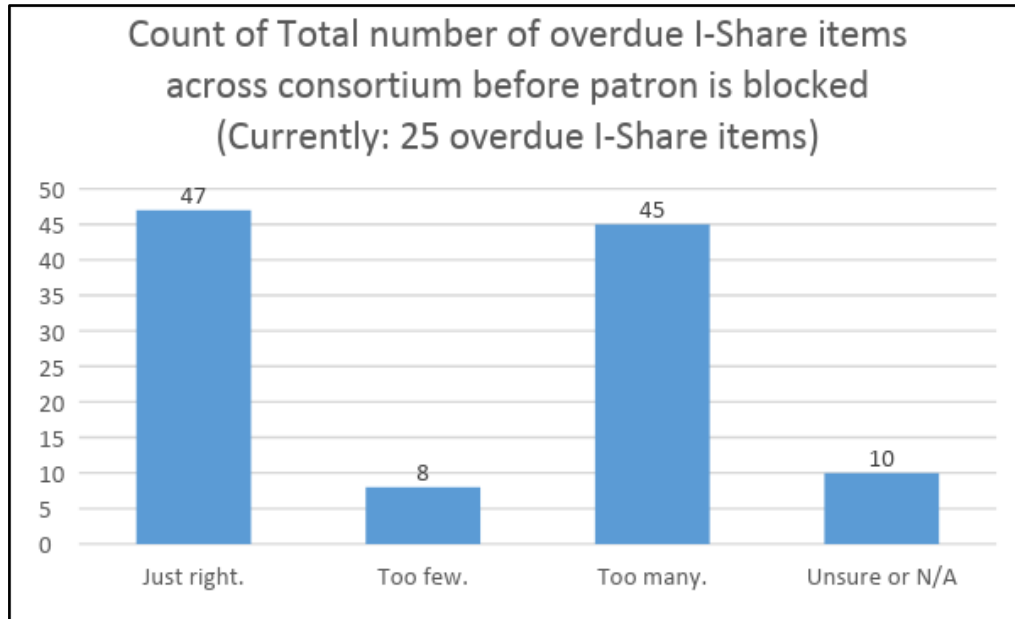
Most of the comments to this question were submitted by those finding the number of overdue items to be too high. Those wanting to see a change in policy suggested 5 to 15 items to be the limit, with just over half of those commenting preferring 10. Some argued the high number left libraries having to wait until 25 items accumulated before getting items returned. Suggestions were also made to have items from home libraries included with the total count. Respondents also brought up the problem of habitual offenders, although this is impossible to track, since this information is deleted immediately upon return of the items, and all counters set back.

> **Sample "Just right" quote:** "*This makes sense to me because so many of our patrons request a large number of items at the same time, and then have 15 books that are all just a few days overdue.*"

> **Sample "Too many" quote:** "*This seems too high. While it is understandable that some patrons might need to check out large numbers of materials for research purposes and accidentally neglect the due date, it still prevents other patrons from having timely access to the materials, particularly if there are few, or no, other copies available in I-Share. Ten or 15 would seem a more reasonable number.*"

6) Total number of lost I-Share items across consortium before patron is blocked (Currently: 3 lost I-Share items)

The majority of responses, 73%, indicate a satisfaction with the current total number of lost I-Share items before the patron is blocked from I-Share. The rest are rather evenly divided among too many or too few.

Count of Total number of lost I-Share items across consortium before patron is blocked (Currently: 3 lost I-Share items)
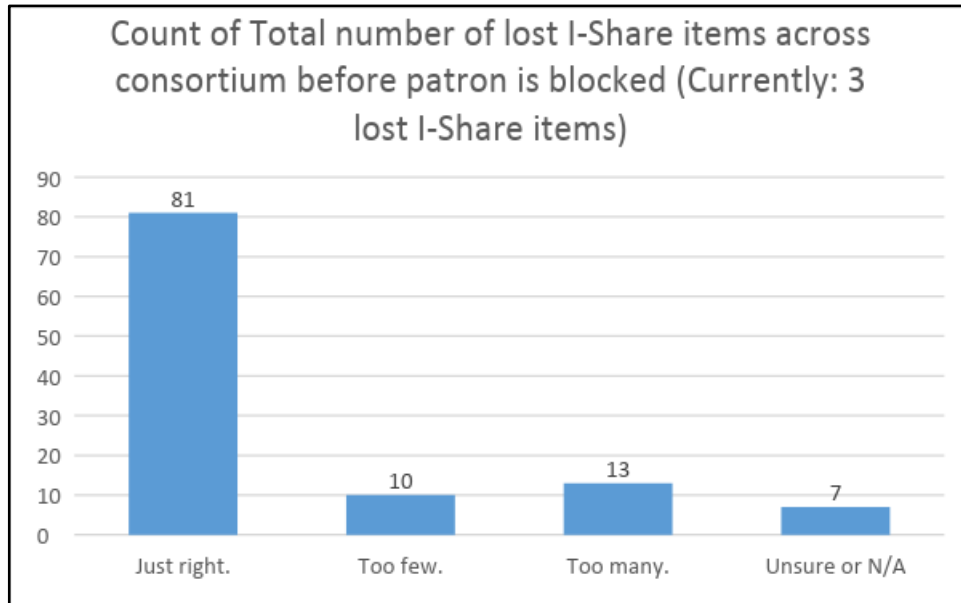
A large majority of respondents were happy with this policy. Those wanting a change pointed out that a library not receiving a book back has no course of action but to wait until the patron lets more items go to "lost" status, or to hope the borrowing library will block their patron if requested to do so. The concept of the habitual offenders came up again in comments here, even though the system is not set up to track this.

> **Sample "Too many" quote:** "*Patrons shouldn't be allowed to borrow any more items till they make restitution on any items they've lost; [sic] especially if they are habitual offenders and are irresponsible or disrespectful of the policies. We've blocked patrons and put charges on their account at their library and never saw the money for books that were never returned. Small budget libraries can't afford to replace everything that patrons never return.*"

7) Total amount owed across consortium before patron is blocked (Currently: $200)

62% of the respondents indicate that the current total amount owed across the consortium before the patron is blocked is a sufficient amount. 18% feel it is too much, 14% too little.
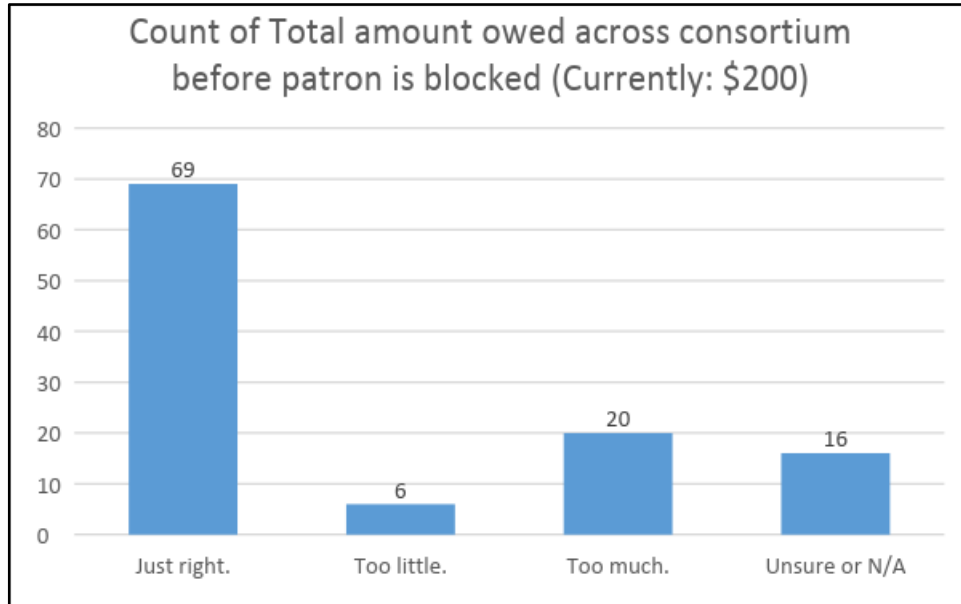
Here again, a majority prevails. Those that did seek a change suggested between $50.00 and $100.00. Respondents leaving comments felt that lending libraries are at the mercy of borrowing institutions when patrons neglect to pay their fines. This seemed more the issue than the amount itself.

Sample "Just right" quote: *"This number makes sense. Initially it sounds high, but not if you consider the processing fees and additional charges that many libraries add to the cost of the book."*

Sample "Too much" quote: *"A stricter policy will help with getting materials back."*

**Sample "Unsure or N/A" quote*: "Collection of any owed money from patrons outside your own institution can be a challenge."*

8) Total amount owed at individual I-Share library before patron receives a fine/fee notice (Currently: $20)

76% of survey respondents indicate that the current amount of $20 owed at an individual I-Share library before the patron receives a fine/fee notice is a sufficient amount. The other responses were negligible.
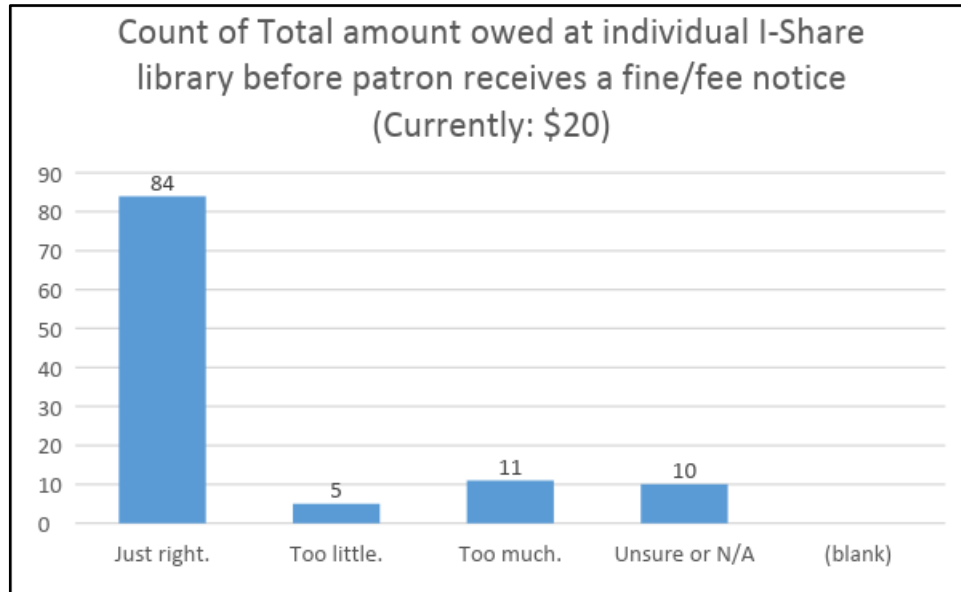

The majority of respondents saw the $20.00 fine as trigger for notices to be sufficient. Those opposed seemed to be from libraries that impose some smaller fines for lost materials, who are then worried that patrons are unaware of having any lost item replacement or lost item processing fines for those items. Others felt no need for notices to be sent until $50.00 are owed.

> **Sample "Too little" quote:** "*Patrons should receive notices sooner than that, so that they are aware of it earlier.. [sic] At least $10.*"

> **Sample "Unsure or N/A" quote:** "*Some books cost below $20.00; perhaps a patron should receive a fine/fee notice for any item once a lost status is applied to the item record.*"

9) Total number of overdue notices a patron should receive per item (Currently: 2 notices)

The majority of respondents (again, 76%) are satisfied with the current count of total number (2) of overdue notices that a patron should receive per item, although 19% did find this too few.
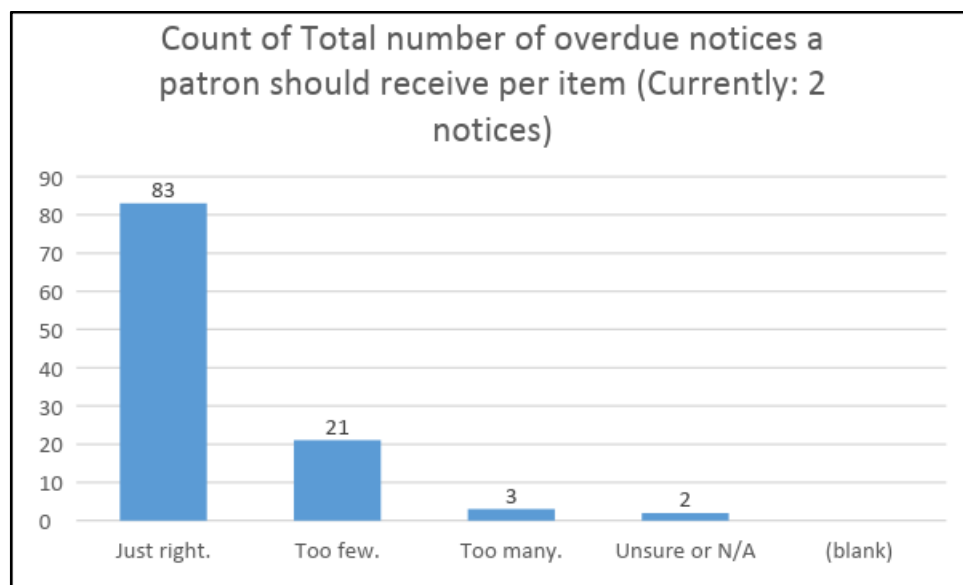
Most respondents felt no need to adjust this policy. Suggestions for increasing the number of notices ranged from one additional "gentle reminder" to "progressively stronger language." Some felt that email notices can be easily overlooked so more should be sent, while, for others, the intention is to annoy the patron enough so that they will take care of the issue.

Sample "Too few" quote: *"Students and faculty tend to have busier schedules as the semester goes on, causing them to forget about their library materials or lose overdue reminders in a sea of e-mails. An extra reminder might be a nice gentle nudge to return their materials."*

Sample "Too many" quote: "*Patrons who pay attention to library notices respond with the 1st notice. Those who do not, may or may not respond when they receive a bill. A courtesy notice of when the item will soon be due and 1 overdue notice before billing is plenty.*"

Conclusions and Possible Future Directions for Study

As of the compilation of this report in May, 2019, the CARLI Office staff were still learning about Alma and the configuration of its circulation functions. As a result, the Resource Sharing Committee has decided that, until CARLI has had sufficient time to study and understand Alma's circulation ("fulfillment") policies and settings, the Committee should not make a formal recommendation on how to apply the information obtained through the survey and subsequent Committee discussions.

For further study, the CARLI Office staff and the I-Share member libraries participating in the Vanguard process may be able to provide feedback towards how I-Share resource sharing functions in Alma. Consortial standardization for resource sharing should remain a central part of "I-Share Next."

This project report is meant to be a summary of the Resource Sharing Committee's work and not a final proposal to the CARLI Executive Board. The committee suggests that UB Borrowing policies should be examined again after Alma implementation.

Members:

Stephanie Baker, Univ. of Illinois at Urbana-Champaign
Steve Brantley, Eastern Illinois University (part year)
Katrina Bromann, Illinois Valley Community College
Andrea Imre, Southern Illinois University Carbondale
Geoff Pettys, Southern Illinois Univ. School of Medicine (part year)
Laurie Sauer, Knox College
Erika Wade Smith, Illinois College
Lisa Wallis, Northeastern Illinois University
Suzanne Wilson, Illinois Wesleyan University

Staff liaison:

Denise Green

Meetings

We met once a month by telephone conference calls on the first or second Wednesday of the month, from 10am – 11:30am. The committee also assisted with SFX Interest Group Open Conference Calls.

- SFX open conference call on Jan. 14, 2019 on Autoloading.
- SFX open conference call on Oct. 4, 2018 on Google Scholar.

Deliverable : See https://www.carli.illinois.edu/SFX_ALMA

The SFX 2019 annual project was "Getting Ready for I-Share Next.
The committee studied Alma/PrimoVE and developed procedures and instructions on how to get ready for the Alma/PrimoVE implementation.

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

2. Examine the free and Open Access targets in shared instance: the members examined the 49 serial free/OA collections currently active in the shared instance. Several were activated or deactivated and errors reported to ExLibris.

3. SFX Usage Statistics: The committee studied the SFX Usage Queries in detail.

They recommended which ones are worth the effort to export and retain before transition to new system. Knox College was the test case.

4. Denise Green drafted Web page of recommended ExLibris documentation and training videos related to link resolver functions in Alma/PrimoVE. Committee members examined the draft and provided feedback.

The SFX Committee studied Alma/PrimoVE and developed procedures and instructions on how to get ready for the Alma/PrimoVE implementation. These tasks and guidelines will help all 38 SFX I-Share libraries.

PRODUCTS & SERVICES / ALMA AND SFX: GETTING READY FOR MIGRATION

Alma and SFX: Getting ready for migration

▼ Reviewing Active SFX Targets: CARLI Licensed Resources

Reviewing CARLI Licensed Resources from the SFX shared instance Procedures

List of CARLI Licensed Resources in SFX shared instance

▼ Reviewing Active SFX Targets: Free & Open Access Resources

Reviewing Free & Open Access Resources Procedures

▼ Alma/PrimoVE Training & Selected Documentation

First do these:

Introduction to Alma

Navigating & Searching in Alma (two lessons)

In Resource Management section (Cataloging, Metadata Editing, other)

Electronic Resource Conceptual Background (15 minutes)

Handout for "Electronic Resource Conceptual Background"

Migration to Alma

General overview SFX to Alma: Web Page and video (8:24 minutes) versions.

Overview from non-ExLibris link resolvers to Alma - including EBSCO

Activation of E-Resources' Collections/Packages-

In Acquisitions training section :Activation Workflows: how to activate, test access and move to discovery any electronic collections/packages, services (full text or selected full text) and/or individual titles/portfolios using Activation task list or Wizard feature. (13 minutes.)

Display Logic for "View it" menus

FL-04 additional fulfillment configuration, includes section on Display Logic in Primo menus. (If X resources available , don't show Y or Z.)

Fulfillment 16: Discovery- Display Logic Rules (12 mins.)

In Primo training section: Overall Concepts for A-Z list of ejournals. (11 minutes)
 NOTE: CARLI will be using Primo VE so any exact "how to set up" steps in plain Primo training may be different in Primo VE version.

DirectLinking & General Electronic Services

Fulfillment 14: Discovery- Direct Linking (6 mins.)

Fulfillment 17: Discovery- General Electronic Services (18 mins.) - setting up asking-a-question or ILL related features

Check as needed

Alma Glossary – Definitions and de facto index to documentation. (Can download as PDF)

Note: Most of these tutorials are from the "Alma Essentials - English" menu.

▼ SFX Usage Statistics

CARLI staff will follow the SFX Systems Committee recommendation to run a report for each SFX library in June 2020 to yield last three years data for:

Queries:

2 -Number of SFX requests and clickthroughs per source – The number of times users clicked the SFX button in any particular source (rec$sourceId) and the number of clickthroughs; output is sorted by source name. (Top Fifty sources only.)

7 -Number of clickthroughs per target – The number of times specific targets were selected in the SFX menu. (Top Fifty targets only.)

12 -Journals requested but have no full–text – The top journals for which SFX requests resulted in no full–text services in the SFX menu. (Top Fifty titles only.)

19 -Most popular journals – The number of times the most frequently requested full–text journals were shown and selected in the SFX menu. (Top Fifty titles only.)

CARLI staff will include notes about factors affecting data such as changes in VuFind catalogs, the A-Z lists and other SFX services.

2018–2019 CARLI Technical Services Committee:
Annual Report of Activities

Members:

Jessica Grzegorski (2016-2019), Newberry Library, Co-Chair
Mingyan Li (2018-2020), University of Illinois at Chicago
Deborah Morris (2018-2021), Roosevelt University
Gayle Porter (2017-2020), Chicago State University
Adrienne Radzvickas (2017-2020), Lincoln College
Nicole Ream-Sotomayor (2016-2019), University of Illinois at Urbana-Champaign, Co-Chair
Cynthia Romanowski (2016-2019), Governors State University
Joan Schuitema (2018-2021), Northeastern Illinois University
William Schultz (2018-2021), Eastern Illinois University

Staff liaisons:

Jen Masciadrelli
Nicole Swanson

2018-2019 Accomplishments:

- Annual project: In collaboration with the CARLI Collection Management Committee, the Technical Services Committee sponsored a day-long event *Change is Good: You go First! Leading Others to and through Change* on April 2, 2019 at the University of Illinois at Chicago.
    - The goals of the forum were to:
        - Introduce attendees to conceptual frameworks of change management that can be applied to many types of library work;
        - Provide tools to help individuals cope with change themselves and to lead other staff members through major changes;
        - Present a variety of case studies illustrating how librarians and library staff have managed change.
    - Registration filled to the capacity of 120 attendees for this event, and a significant majority of attendees (over 80%) thought that the forum was worthwhile and useful for their jobs. Survey respondents commented that the event was inspiring, motivating, refreshing, and positive.
    - Slides, handouts, and other resources from *Change is Good: You Go First!* are available on the CARLI website: https://www.carli.illinois.edu/products-services/i-share/secure/change_is_good_you_go_first
- Based on recommendations from Alma documentation, ELUNA presentations, and other Alma customers, the Technical Services Committee and CARLI Staff put together a list of prioritized database maintenance tasks. Recommendations are available on the CARLI website: https://www.carli.illinois.edu/products-services/i-share/alma/datacleanup
    - Projects were marked as **Critical**, **High Importance**, and **As Time Permits** to allow member libraries to more easily prioritize their maintenance projects.
    - The maintenance recommendations include links to specific tasks in CARLI's existing "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" page, a

notation on what type of record is affected by the maintenance task, clean-up methods, links to CARLI Web Reports when available, and I-Share statistics.
  o The website is linked from CARLI's "Alma & Primo VE" page, allowing member libraries to easily find the maintenance priorities.
- Maintained the Calendar of Upcoming RDA Trainings: https://www.carli.illinois.edu/products-services/i-share/cat/rda-resources-upcoming-training
- Cynthia presented our Annual Project at CARLI Annual Meeting November 2, 2018.

Future Plans:

- Continuing work with CARLI staff to update the page on "Pre-Migration Database Maintenance" as more is learned about Alma.
- Plan an open call with member libraries to discuss issues surrounding database maintenance after the test load of library data is complete in September.
- Work with CARLI to monitor and address member needs through the migration process.

2018–2019 CARLI Technical Services Committee Annual Project:
Change Is Good: You Go First! Leading Others to and Through Change

The CARLI Technical Services Committee and Collection Management Committee sponsored a day-long event focusing on managing change, held on April 2, 2019, at the University of Illinois at Chicago. Registration filled to the capacity of 120 attendees for this event.

While the genesis of *Change is Good: You Go First!* was I-Share members' upcoming migration from the Voyager ILS to Alma and Primo VE, the committees designed this forum to address organizational change holistically. The goals of the forum were to:

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

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

The afternoon was devoted to breakout sessions organized by the Technical Services, Collection Management, and Public Services Committees, giving attendees a chance to focus on working with change in particular areas of specialization. These sessions included managing a large, unplanned change by technical services librarian Deborah Morris; implementing new methods of collection development by Michelle Oh, Paolo Gujilde, and Kimberly Shotick; project management tools by Jennifer Dalzin and Alicia Esquivel; and the public services impact from system changes including New VuFind, Alma, and Primo by Erika Wade Smith, Niamh McGuigan, and Geoff Morse. Speaking in her role as a therapist, Joan Schuitema presented on the importance of personal change during organizational change to conclude the day.

CARLI member institutions showed great interest in this topic and the event. Of the attendees who responded to a survey on *Change is Good: You Go First!* a significant majority (over 80%) thought that the forum was worthwhile and useful for their jobs. Many attendees appreciated learning about both the larger concepts of change management and more specific details about the upcoming migration to Alma and libraries' concrete experiences with managing change. Survey respondents commented that the event was inspiring, motivating, refreshing, and positive.

Slides, handouts, and other resources from *Change is Good: You Go First!* are available on the CARLI website: https://www.carli.illinois.edu/products-services/i-share/secure/change_is_good_you_go_first

2018-2019 Technical Services Committee:

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