
**CARLI Collection Management Committee:
FY 2023 Annual Report of Activities and Projects**

Members

Chad Buckley, Co-chair	2017-2023	Illinois State University
Janice Derr	2021-2024	Eastern Illinois University
Stephanie Fletcher	2022-2023	Illinois Institute of Technology
Jeannette Glover	2022-2025	Spoon River College
Gwen Gregory	2022-2023	Northern Illinois University
Carl Lehnen	2022-2025	University of Illinois Chicago
Jayna Leipart Guttilla, Co-chair	2021-2024	Illinois Valley Community College
Kris Veldheer	2021-2024	Catholic Theological Union
Erin Zimmerman	2022-2025	Heartland Community College

CARLI Staff Liaisons: Elizabeth Clarage, Jennifer Masciadrelli

Meetings

The committee met regularly, generally once each month. All meetings were held by remote teleconferencing or conference calls. The work of the committee this year was conducted by subcommittees. Subcommittees also met regularly and reported their activities back to the full committee.

Subcommittees

Archives Subcommittee

This subcommittee consisted of Elizabeth Clarage, Jayna Leipart Guttilla, Kris Veldheer, Jen Masciadrelli, and Erin Zimmerman. Meeting regularly, this subcommittee discussed how it might support the CARLI's members interest in having guided help with institutional archives. The subcommittee held an informal virtual discussion in November 2022 that was well attended. From that meeting, the subcommittee created and distributed an Archives Survey. With the preliminary results, the Collection Management Committee proposed an Archives Task Force to the CARLI Governance Board at its March 2023 meeting which was approved. The subcommittee prepared an extensive report of the survey responses that will be shared with the membership in Summer 2023.

Open Access Collections Subcommittee

This subcommittee met for the first time on January 10, 2023. Carl Lehnen and Stephanie Fletcher were the CMC representatives on this cross-consortial subcommittee. Together with their peers from other CARLI committees, they assessed 35 electronic open access collections from Alma's Community Zone and recommended 18 collections to activate in the Network Zone. Denise Green and Jennifer Masciadrelli from CARLI provided support.

Diversity, Equity, and Inclusion Continuing Education Subcommittee

Members of this subcommittee were Chad Buckley, Elizabeth Clarage, Stephanie Fletcher, Gwen Gregory, and Jen Masciadrelli. The group met several times throughout the year and discussed potential DEI-related areas of interest regarding collections. In order to get a better sense of CARLI members' needs and concerns related to DEI and collections, the subcommittee hosted an online "Open Discussion on Building Diverse and Inclusive Collections" on April 27, 2023 from 2:00-3:00 PM CST. Stephanie Fletcher moderated the discussion which included approximately 45 attendees. Topics which arose related to DEI included: setting aside specific funds, GOBI slip plans, diversity audits, identifying publishers, promotion of materials, and useful resources.

Weeding Ebooks Subcommittee

Members of this subcommittee were Chad Buckley, Elizabeth Clarage, Janice Derr, Jeanette Glover, Gwen Gregory, and Jen Masciadrelli. In 2000, the Illinois Digital Academic Library (IDAL), one of CARLI's three founding organizations, purchased perpetual access to ebooks from NetLibrary (now EBSCOHost ebooks). CARLI Governing Members have access to 1,970 ebooks via this purchase. Most titles were published around 1999-2000, so there were concerns about these ebooks' age and current usefulness. Members of the subcommittee reviewed the title list and split that up by subject for more intensive review. Each subject area was divided into titles which might still be relevant now versus those which might contain outdated information. After review, more than 90% of the collection was deemed to be historical in nature. Therefore, the subcommittee determined that a note for the entire collection would be appropriate.

Additional possible future tasks

Discussion of future projects is ongoing.

CARLI Commercial Products Committee FY 2023 Annual Report of Activities and Projects

Members

Amy Fry	2022- April 2023	University of Illinois at Urbana-Champaign
Jessica Harris	2021-2024	University of Chicago
Michele Hunt, Chair	2021-2024	Northern Illinois University
Sarah Johnson	2021-2024	Eastern Illinois University
Marie Martino	2022-2025	Moraine Valley Community College
Thane Montaner	2022-2025	Prairie State College
Mary Tatro	2021-2023	Augustana College
Scott Thomson	2022-2025	Rush University
Amanda Wiesenhofer	2021-2023	Lincoln Land Community College

CARLI Staff Liaison: Nicole Ream-Sotomayor, Jennifer Taylor

Activity Highlights

Electronic Resource Proposals

The CPC received 5 product proposals in FY23. After review by the committee, 1 proposal for KanopyBASE was accepted. 1 proposal is still in discussion by the committee.

Open Access Talks

For this year's project, the committee planned a series of 3 talks centered around open access (OA) in libraries, titled: *Commercial Products Committee - Open Access Talks*. The goal was to create a space for library staff to learn about and informally discuss specific aspects of OA with fellow colleagues. CPC hoped to cover publishing models, business models, and management challenges. Due to time constraints, the committee was able to hold 1 of the 3 talks. However, CPC plans to revisit the series in FY24 after receiving positive feedback from the first session.

Session 1: Introduction to Open Access in Libraries

The session started with a short presentation providing an overview of the landscape regarding libraries' relation to open access publishing and business models, challenges, and current trends. After the presentation, an open discussion was held where folks contributed questions about the presentation and resources that were shared. The talk was well attended, with 33 registrants. Only the presentation section of the talk was recorded so that those not in attendance could listen along with the provided slides and those in attendance felt comfortable sharing during the discussion.

CARLI Discovery Primo VE Committee, FY23 Annual Report

Summary report of the work of the Discovery Primo VE Committee (DPVC) during the period July 1, 2022 – June 30, 2023.

Committee members:

- Andrea Belongea (Columbia College Chicago), 2022-2024
- Allan Berry (University of Illinois at Chicago), 2022-2024, co-chair
- Alice Creason (Lewis University), 2022-2023 (resigned in January 2023)
- Marlee Graser (Southern Illinois University Edwardsville), 2022-2025
- Colin Koteles (College of DuPage), 2022-2025
- Matthew Short (Northern Illinois University), 2022-2025
- Lindsey Skaggs (Illinois State University), 2022-2023, co-chair
- Rachelle Stivers (Heartland Community College), 2022-2023
- Aimee Walker (Joliet Junior College), 2022-2024
- CARLI Staff Liaisons: Jessica Gibson, Amy Maroso

Our committee assists member institutions to benefit from our consortium-level search and discovery system, Primo VE by Ex Libris. In collaboration with CARLI staff, we promote an open approach to solve discovery issues, both at individual libraries and within the consortium, emphasizing efficient best-practices, documentation, and programs. This work stems in part from our growing experience with Primo VE itself, as we explore its features and navigate the resources provided by Ex Libris. We organize educational initiatives and create documentation tailored to meet the specific needs of CARLI members.

This was the first year of the committee, succeeding the Discovery Primo VE Task Force, from which it inherited an existing set of four sub-committees. The DPVC largely co-opted these sub-committees, retaining their basic scope, with new membership and tasks, to retain some momentum. This structure also helped us to leverage the varied expertise of our committee members in parallel, to both address known issues in Primo VE and to disseminate what we have learned.

Organization

As a new committee, we worked to establish solid norms for committee document organization, e.g. minutes and agendas, and paid close attention to our CARLI committee charge. We provided feedback on our new committee's charge, and included language on usability and accessibility in our charge, to emphasize our focus on assistance to our member libraries and their patrons/users.

The full committee met monthly via Zoom, with subcommittees meeting separately, as needed, also over Zoom. A committee email list was used for communication outside of meetings.

Subcommittees

Over the course of the last year, the DPVC has made progress on multiple tangible fronts, largely through the efforts of four sub-committees:

Dedup/FRBR

- Members: Andrew Belongea (chair), Alice Creason
- The Dedup/FRBR subcommittee aimed to improve the description and discovery of complex materials within Primo VE, a continued issue for member libraries.
- Investigations have begun with the Bible because, under default FRBR configurations, users find specific copies or versions of it difficult to retrieve in Primo VE. This work is ongoing and is slated for continued exploration during FY24.

Local Fields

- Members: Matthew Short (chair), Marlee Graser
- The Local Fields subcommittee aimed to identify Local Fields that could be configured for search and display in the Network Zone (NZ) and made available to member institutions.
- Like the Local Resource Types subcommittee below, this is an important CARLI-backed initiative, reflecting a consistently high volume of support tickets received from member libraries.
- The subcommittee made substantial progress this year by identifying a first set of Local Fields for consortial standardization, and testing them in CARLI's Premium Sandboxes. This work is ongoing and a second set of Local Fields will be addressed during FY24.

Local Resource Types

- Members: Andrew Belongea (chair), Lindsey Skaggs
- The Local Resource Types subcommittee aimed to identify and define Local Resource Types to be configured in the NZ, applied to NZ records, and made available for member institutions.
- Like the Local Fields subcommittee above, this is an important CARLI-backed initiative, reflecting a consistently high volume of support tickets received from member libraries.
- The subcommittee developed definitions for nine new local resource types (DVD, Blu-Ray, Videocassette, Film Reel, Laser Disc, CD, LP, Audiocassette, and Audiotape Reel) and one secondary resource type, Government Document, which were discussed with and vetted by the Technical Services Committee.
- Indication rules in Alma were developed and tested to identify bib records that are miscoded and may not display properly when the new consortial Local Resource Types are implemented. This will allow CARL, and member libraries to fix these records.
- The subcommittee plans to release these new consortial Local Resource Types and accompanying documentation during FY24, once clean-up on NZ shared bib records has taken place.

Usability Best Practices

- Members: Lindsey Skaggs (chair), Aimee Walker, Colin Koteles, Rachelle Stivers, Allan Berry
- The Usability Best Practices subcommittee aimed to develop programming to foster information sharing and guidance related to Primo VE usability.
- The subcommittee produced a webinar during the Fall 2022 for CARLI members, *Usability 101*, about user interface (UI) design and usability testing. This started with a presentation about UI best practices and how they relate to Primo VE, offering suggestions for how to approach usability before starting any testing. From there, panelists walked through their experiences with usability testing, sharing timelines, strategies, and tips for getting started.
- A follow-up webinar is scheduled for July 2023, to highlight “pain points” that institutions found through their Primo VE usability testing and how to mitigate those problems through customization of their Primo VE instances.

Other Activities

- **Idea Exchange feedback coordination**

The committee started an ongoing initiative to leverage the Ex Libris “Idea Exchange” (<https://ideas.exlibrisgroup.com>) feedback system, sharing and encouraging member libraries staff to vote on specific Primo VE-related Idea Exchange issues that the committee believes are of interest to CARLI member libraries. This helps gather support for, and to focus the collective influence of our membership on, needs specific to consortia of our size.

The committee designed and produced outreach/marketing materials to share with members. We subsequently have seen an accompanying rise in votes for suggested issues, at least anecdotally.

Future Plans

This year, the CARLI DPVC made good progress establishing itself, starting new initiatives, and on continuing work done by the preceding Task Force. In the coming year, we hope to:

- Implement, document, and provide an overview showing end results and walkthrough of the new consortial Local Fields, a need recognized through committee feedback.
- Implement and provide documentation for new consortial Local Resource Types.
- Continue work with FRBR and Dedup configuration and provide guidance to member libraries.
- Measure Idea Exchange vote tallies, to learn how effective our feedback coordination efforts are, and how best to continue going forward.
- Continue implementation and usability webinars as an ongoing service to CARLI members.
- Provide CARLI membership with enhanced guidance for the customization and configuration of Primo VE. This could include a combination of discussion, documentation, and advocacy.

CARLI E-Resources Management Committee
FY 2023 Annual Report of Activities and Projects

Members

Elizabeth Hollendonner	2022-2024	Millikin University
Andrea Imre	2022-2024	Southern Illinois University Carbondale
Sarah Kurpiel	2022-2023	Benedictine University
Elizabeth Nelson	2022-2025	McHenry County College
Elaine Fetyko Page	2022-2023	Elmhurst University
Sara Rizzo	2022-2025	National Louis University
Megan Ruenz	2022-2024	Wheaton College
Lisa Wallis	2022-2025	Northeastern Illinois University
Craig Whetten	2022-2023	Western Illinois University

CARLI Staff Liaisons: Denise Green, Nicole Ream-Sotomayor

Meetings

The committee generally met on the third Thursday of most months via Zoom. Since this is a newly created committee (previously a task force), most of our meetings involved establishing the committee’s goals and exploring the knowledge its members already have and could present on to CARLI members.

Activity Highlights

Three of our members (Andrea Imre, Elizabeth Nelson, and Craig Whetten) volunteered to help CARLI find, recommend, and review Open Access collections to add to the Network Zone.

The committee worked with Denise Green to review her Broken Links Troubleshooting page: <https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/primove-broken-links>. Committee members also committed to attending the December 8 CARLI Office Hours, which featured Denise’s page on troubleshooting and helped answer questions that came up after the presentation. Some committee members also helped Denise test the [Nexis Uni article-level workaround](#) before she sent the information to all CARLI members.

After a discussion of Community Zone collections and electronic collection activation workflow, the committee recommended that CARLI include the Collection ID in the CARLI Selection tool to make it easier for libraries to identify the correct collection to activate. Marisa Tolbert worked on this implementation.

Andrea Imre, Megan Ruenz, and Lisa Wallis led an event in February that was a follow up/next steps for using Alma Analytics in conjunction with SUSHI harvested information. Liz Hollendonner moderated the chat and questions. There were 55 participants at this

presentation. As part of the registration for this event, a short survey was employed to collect additional questions the CARLI community has on this subject.

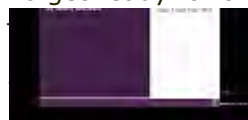
Thursday, February 16, 2023 - 10:00am to 11:30am

The E-Resources Management Committee invites you to continue the discussions started last year around Alma Analytics.

Topics covered:

- Copying & Customizing Alma Shared Analytics Reports for E-Resources
- How to Create Basic Electronic Usage Reports once SUSHI is set up
- How to work with non-COUNTER Compliant Usage Statistics in Alma

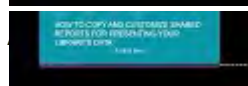
To get ready for this session, please review two previous sessions:



Alma Analytics for IPEDS and ACRL Reporting Data (presented Feb. 18,



Configuring SUSHI in Alma (presented April 14, 2022):



Alma Analytics Part II session recording:

[Alma Analytics Part II session slides](#)

Future Plans

There was a discussion about doing a session to help explain a PrimoVE webhook, which requires a code from the vendor, to improve article level linking in NewsBank. However, we discovered that ExLibris currently uses a generic parser for this collection, which could potentially be updated to provide article level linking. Denise Green volunteered to reach out to ExLibris about this possibility before the committee pursues this plan.

One of the projects the committee wanted to work on this year included a presentation on vendor licenses in Alma; however, only one or two of our members currently have experience with this. The committee decided to wait until August to present on this topic, giving other members a chance to gain experience working on this process in their own institutions over the summer.

Another project the committee was looking into included display logic and direct linking in PrimoVE. The committee agreed to table this project as ExLibris has announced that changes are coming for network zone collections in regards to display logic in the next three to six months. Once these changes are announced/implemented, the committee will help with revising CARLI's current resources on the subject as well as discuss the possible need to present on the topic.

2022 - 2023 CARLI Instruction Committee Annual Report of Activities

Members:

Alex Deeke, 2022-2025, University of Illinois Urbana-Champaign
Guillermo Gasca, 2022-2025, Morton College
Joanna Kolendo, 2021-2023, Chicago State University
Heather Koopmans, 2021-2024, Illinois State University, *co-chair*
Abigail Mann, 2022-2023, Illinois Wesleyan University
Alex O'Keefe, 2021-2023, School of the Art Institute of Chicago, *co-chair*
Claire Reinert, 2022-2025, McKendree University
Firouzeh Rismiller, 2021-2024, DePaul University
Rebecca Starkey, 2022-2024, University of Chicago

CARLI Staff Liaisons:

Debbie Campbell
Denise Green

Charge:

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

Meetings:

All meetings were held by video conference and took place on the third Tuesday of the month from 2:00 - 4:00 p.m. with an exception in April when it was held on the second Tuesday due to Co-Chair scheduling conflicts. The committee also used the instruction@carli.illinois.edu mailing list and a Google Drive folder to communicate outside of meeting times and share information and documents.

Theme and summary for the year:

The committee's theme this year was *Re-examining Instruction*. In academic year 2022 - 23, many institutions fully resumed in-person classes, yet the profound effects and experiences of living through the COVID pandemic remain. Regarding library instruction, we found ourselves discussing the importance of slowing down, reflecting on current teaching priorities, thinking anew about what's working (or not) in the classroom, and finding balance when setting professional goals. *Re-examining Instruction* speaks to this time of introspection as librarians continue to build upon instructional innovations that arose during the first years of the pandemic, while also letting go of practices which no longer seem necessary or useful, in order to seek sustainability rather than simply 'doing more'.

Much of the Instruction Committee's programming this year was discussion-based, providing opportunities for the CARLI membership to meet colleagues, share experiences, and

ask questions. These meetings often revolved around the examination of recent publications and professional resources, providing entry points to in-depth dialogue. We hosted four virtual events between October 2022 and April 2023: two moderated discussions, one article discussion, and one guest researcher/author chat hosted in partnership with the University of Illinois Library at Urbana-Champaign [outlined in detail below]. In order to encourage open conversation, three of these events were not recorded; however, to create shareable documentation of these events the Committee integrated active use of Google Docs to provide participants with enhanced channels for anonymous conversation, a streamlined space for resource-sharing, and a crowdsourced approach to notetaking - a new effort this year.

Our fifth and final event was the 11th annual CARLI Instruction Showcase, held virtually on June 1, 2023. In keeping with past Showcases, it provided a platform for CARLI librarians to share practical approaches to instruction with their peers. Four presentations grouped into two sessions – “Tech it Out” and “Re-examining Lessons” – highlighted strategies to enhance engagement, accessibility, and sustainability through innovative lesson planning and use of instructional technologies. The day ended with a social and share out that combined committee-generated questions with open discussion, providing attendees with a chance to socialize and reflect at the end of this academic year.

As of this writing, the Committee is circulating a feedback form to collect input that will be used to inform instruction-related programming in the coming year. We recommend that these survey results be passed along to the 2023 - 24 Instruction Committee members at the start of the next cycle so that they can take this information into account when identifying a new yearlong theme and program roster (including a 2024 Showcase, should they wish to continue that event).

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

Instruction Committee Events:

Re-examining Quiet Quitting

- Date and time: Monday, 10/24, 11:00 a.m. - 12:00 p.m.
- Location: Virtual through Zoom
- Attendance: 94 people registered for this event and up to 63 people logged in.
- Description: Quiet Quitting is everywhere lately. Some believe Quiet Quitting is the result of lazy workers, poor managers, burnout, or the need for new labor rights. All of these perspectives are ultimately opening up dialogues around what it means to show up for work. Join us for our own discussion on Quiet Quitting and how it is impacting library work, culture, and instruction. Rather than one shared reading, we've started a suggested resource list [here](#). We encourage you to add any articles, podcasts, or videos you've engaged with on the topic as well!
- [Crowdsourced resource and discussion document](#)

Re-examining One-Shot Instruction

- Date and time: Friday, December 9, 1:30 - 2:30 p.m.
- Location: Virtual through Zoom
- Attendance: 81 people registered for this event and up to 55 people logged in.
- Description: Join the CARLI Instruction Committee for a virtual discussion of “You Only Get One Shot: Critically Exploring and Reimagining the One-Shot Instruction Model” (Pho, Abumeeiz, Bisbee, Mody, Romero, Tranfield, & Worsham) from the September issue of *College & Research Libraries*. Full text of this article may be freely accessed at: <https://crl.acrl.org/index.php/crl/article/view/25577>

Participants are encouraged to read the article ahead of time (but all are welcome to join regardless). This will be an interactive discussion among participants, and an opportunity to reflect on the authors’ research findings as well as on our own experiences with providing one-shot instruction. [Visit our discussion document](#) to share your first impressions ahead of the event. This document also includes discussion questions adapted from the article and will be used during the event for anonymous contributions during the discussion.

- [Associated article](#) and [crowdsourced discussion document](#)

Re-examining Instruction Practice: New Year’s Instructional Resolutions

- Date and time: Friday, January 27th, 2:00 - 3:00 p.m.
- Location: Virtual through Zoom
- Attendance: 42 people registered for this event and up to 26 people logged in.
- Description: We hope you’ve all had a restful and rejuvenating holiday! As we flip our calendars to the new year, the CARLI Instruction Committee would like to invite you to our January event, *Re-examining Instruction Practice: New Year’s Instructional Resolutions*. This event will provide a virtual space for you to reflect upon and share some elements of your instruction practice that went well this past year, and to identify areas in which you could try something new. Please join our casual conversation to hear what your peers have learned over the past year, offer your own insights, and hopefully be inspired by new ideas and practices!
- [Discussion document](#)

Start With Students: A Virtual Chat with the Executive Director of Project Information Literacy, Dr. Alison Head

- Date and time: Wednesday, April 12, 2023, 1:00 - 2:00 p.m.
- Location: Virtual through Zoom
- Attendance: 93 people registered for this event and up to 53 people logged in.
- Description: Join the CARLI Instruction Committee in partnership with the University of Illinois Library at Urbana-Champaign for a virtual Zoom chat with [Dr. Alison Head](#), Executive Director of Project Information Literacy (PIL). Centering around the question “**Why do most students use campus libraries, but far fewer turn to librarians for help?**,” Dr. Head will lead an engaging discussion highlighting major findings from [“The](#)

[Project Information Literacy Retrospective: Insights from more than a decade of information literacy research, 2008-2022](#)". PIL's empirical research reveals what students can teach us about their information habits and strategies, and Dr. Head will introduce PIL's model for the undergraduate research process as a tool for building student success and use of library services. Participants are encouraged to review the report above prior to this lively discussion session.

- [Associated pre-reading; recording and additional bibliography](#)

11th Annual Instruction Showcase

- Date and time: Thursday, June 1, 1:30 - 4:00 p.m.
- Location: Virtual through Zoom
- Attendance: 83 people registered and up to 45 people logged in.
- Description: We hope you've saved the date! Registration to attend the 11th Annual CARLI Instruction Showcase is now open. This free virtual event is hosted by the CARLI Instruction Committee and will be held via Zoom on Thursday, June 1, from 1:30 to 4:00 p.m CDT. Please share with anyone at your institution who may be interested.

This year's program explores the theme of "Re-examining Instruction", highlighting how reflection can lead to innovation and enhanced engagement, accessibility, and sustainability in library instruction. The afternoon program will feature "Tech it Out" and "Re-imagining Lessons" presentations, followed by a wrap-up social where participants can socialize, network, and talk about instruction with their colleagues from across CARLI. Please join us!

- [Instruction Showcase website with presenter-submitted materials and associated recording\(s\).](#)

Respectfully submitted by Heather Koopmans and Alex O'Keefe, Co-Chairs, 2022-2023 on June 5, 2023.

CARLI Open Educational Resources Committee

FY2023 Annual Report of Activities and Projects

Members

Dorinne Banks	2022-2025	Adler University
Amber Burtis	2021-2024	Southern Illinois University Carbondale
Catherine Galarza-Espino	2021-2023	Morton College
Kim Hale	2022-2025	Columbia College Chicago
Lauren Kosrow	2022-2023	College of DuPage
Daniel Matthews, Co-chair	2020-2024	Moraine Valley Community College
Christina Norton	2022-2024	Bradley University
Dee Anna Phares	2022-2025	Northern Illinois University
Tineka Scalzo, Co-chair	2021-2024	City Colleges of Chicago
Chris Sweet	2020-2023	Illinois Wesleyan University

CARLI Staff: Elizabeth Clarage, Anne Craig, Michele Leigh, and Nicole Swanson

Meetings

The committee met monthly by conference call on the first Tuesday of each month from 12:00-1:30 p.m.

Activities

Understanding and Promoting Open Educational Resources Workshops

This 3-week virtual “Train the Trainer” course was developed in 2020 by the OER Committee and is based on openly licensed materials from the Open Education Network. It meets synchronously for an hour and half each week along with asynchronous readings and activities. During FY23, 6 workshops were held including two in December, one in February, two in May, and one in June. 78 registrants benefited from the offerings of this course.

This course was taught by: Annette Alvarado (Loyola University Chicago), Dorinne Banks (Adler University), Anne Chernaik (College of Lake County), Elizabeth Clarage (CARLI), Kim Hale (Columbia College Chicago), Lauren Kosrow (College of DuPage), Michele Leigh (CARLI), Dan Matthews (Moraine Valley Community College), Thane Montaner (Prairie State College), Christina Norton (Bradley University), Michelle Oh (Oakton College), Dee Anna Phares (Northern Illinois University), Tineka Scalzo (City Colleges of Chicago), Anne Shelley (Illinois State University), Nicole Swanson (CARLI).

OER Faculty Workshop

The Committee designed and developed in 2021 an OER Faculty Workshop to be offered periodically to faculty and administrators from Illinois institutions as well as those who are members of the Professional Development Alliance consortia. The workshop was held in FY23 on September 9, January 26, February 1, and February 23. 11 reviews were generated through member institutions offering stipends to their faculty, and 3 through institutions with no incentive, who attended and wrote a review in the Open Textbook Library. Registration and attendance for both workshops demonstrated a strong interest in learning more about OER from faculty across the state as reflected in the numbers below. 97 total faculty members and librarians attended the workshops.

The workshop was taught by: Amber Burtis (Southern Illinois University Carbondale), Elizabeth Clarage (CARLI), Michele Leigh (CARLI), Dan Matthews (Moraine Valley Community College), Elizabeth Nelson (McHenry County College), Sue Shultz (DePaul University), Nicole Swanson (CARLI), and Chris Sweet (Illinois Wesleyan University).

Open Pedagogy Workshop

The Committee designed and developed in 2023 an Open Pedagogy Workshop. The workshop was first presented to a cohort of Northern Illinois University faculty on March 31 and a second offering was opened to all CARLI members on April 25. Twenty-five members benefited from these sessions. This workshop was developed and taught by Elizabeth Clarage (CARLI), Lauren Kosrow (College of DuPage), Michele Leigh (CARLI), Dan Matthews (Moraine Valley Community College), Nicole Swanson (CARLI), and Chris Sweet (Illinois Wesleyan University).

OER Commons and the Open Illinois Hub

Throughout 2022-2023 the OER Committee continued to promote using and adding to the [Open Illinois Hub](#) on OER Commons.

26 CARLI libraries have developed intuitional presences within the Open Illinois Hub. The “Curated Collections” portion of the hub has been maintained over the last year, while “OER from Illinois” has increased to 83 items.

On October 19, 2022, OER Committee members Elizabeth Clarage (CARLI), Dan Matthews (Moraine Valley Community College), Tineka Scalzo (City Colleges of Chicago), and Chris Sweet (Illinois Wesleyan University) gave a presentation on the OER Commons Hub at the Illinois Library Association Annual Conference titled “CARLI Presents: The Open Illinois Hub”.

Open Education Network: Certificate in OER Librarianship Program

In Fall 2022, the CARLI OER Committee proposed to the Program Planning Committee to offer full scholarships for up to five librarians from CARLI-member institutions to attend the Open Education Network’s Certificate in OER Librarianship. This proposal was accepted. In October, the CARLI OER Committee held an information session about the Certificate Program that allowed interested individuals to ask questions of their CARLI colleagues that had completed the program. There were 17 registrants.

Seven individuals from CARLI Members were accepted into this competitive program. Three received full scholarships from the OEN and one received a partial scholarship. CARLI provided funding for four CARLI Member library staff.

Creative Commons Certificate Program

In December 2022, the CARLI OER Committee proposed to the Program Planning Committee to offer partial registration reimbursement of \$200 each for up to 30 CARLI librarians and staff to attend a Creative Commons Certificate Program. This proposal was accepted. Eight individuals from CARLI Members requested and received funding for this program.

Open Education Week

As part of Open Education Week, March 6-10 2023, CARLI hosted 5 webinars, shared CARLI member institutions' OER Success Stories on the CARLI [OER Open Education Week 2023](#) webpage, and collected attendees' aspirations and inspirations via a padlet. Events from the week were documented on the [CARLI OER Open Education Week 2023](#) webpage.

Open Education Week Webinars

“Making Sense of ‘Affordable’ Course Materials Models.” March 8, 2023

Nicole Allen and Katie Steen-James, SPARC, outlined the facts and characteristics of common models to make course materials more affordable and untangle some of the arguments that come up in meetings with outside vendors. They shared questions we should be asking about affordable models and ways we can be thinking beyond procurement.

“OER in Practice: A Faculty Panel Discussion.” March 8, 2023

Professors Nicholas Hackett, Moraine Valley Community College; Jeanne Petrolle, Columbia College Chicago; and Joel Quam, College of DuPage shared their experiences implementing Open Educational Resources in their courses.

“Get to Know the New, Upcoming Illinois SCOERs Open Educational Resources”

- **Program 1.** March 6, 2023

Dr. Diana Zaleski from the University of Illinois Springfield speaks about the upcoming open textbook *The Psychology of Exceptional Children* and Dr. Karen Vuckovic, Amy Hoang, Delilah Przybyla, and Hannah Koffman from the University of Illinois Chicago speak about their work on upcoming OER textbook and illustrations *Essentials of Pharmacology*.

- **Program 2.** March 7, 2023

- Dr. Lonetta Oliver, Justin Leuba, and Daniel Fuertges, Illinois Central College, discuss the development of *Nurse Assistant Training*.

- Health Sciences Librarian Amber Burtis together with Professor Tim Davis from Southern Illinois University Carbondale outline Davis' open textbook *Anatomy and Physiology for Allied Health Professions*.
 - Dr. Jacqueline Samuel from National Louis University discusses her upcoming open textbook *Cultural Humility in Public Administration*.
- **Program 3. March 9, 2023**
 - Dr. Barbara Anderson, the Head of the Instruction/Learning Library at Roosevelt University, elaborates on a collaborative project between Roosevelt University, De Paul University, and Harper College entitled Development and Implementation of Open-Access Problems and Activities for Health-Focused Chemistry Courses.
 - Professor Juhelia Thompson from Morton College elaborates on her work on the open textbook *Diverse Approaches to Language Development*.
 - Dr. Samar Hegazy, Carle Illinois College of Medicine and Professor Judith Thorn, Associate Dean for Curriculum and Assessment at Knox College share their development of the open textbook *The Female Reproductive System and Women's Health Through a Multidisciplinary Lens*. This is a collaborative project between Carle Illinois College of Medicine/ the University of Illinois Urbana-Champaign and Knox College.

OER Success Stories

The committee also shared CARLI member institutions' OER Success Stories to the [CARLI OER Open Education Week](#) webpage. We received a total of 4 success stories from: Bradley University, CARLI Counts, Northwestern University, and University of Illinois Urbana-Champaign.

OER Office Hours

The OER Committee continued this professional development opportunity for CARLI members in FY23 to provide a space for informal discussions about OER. Eight sessions were held throughout the year. The committee continued to take [notes](#) from the conversations and share them with the CARLI OER email list to make them available to members that could not attend and provide links to resources shared during the conversation. 113 attendees joined and benefited from the talks over the course of the year. The topics of discussion included:

- "Local Program Planning" (September) facilitated by Dan Matthews
- "Faculty Incentive Programs" (October) facilitated by Amber Burtis
- "Assessing the Impact of OER" (November) facilitated by Christina Norton
- "Moving from Cheerleading to Change" (December) facilitated by Dee Anna Phares
- "Remixing OER" (February) facilitated by Tineka Scalzo
- "Zero Textbook Cost Programs" (March) facilitated by Lauren Kosrow
- "Countering OER Arguments" (April) facilitated by Chris Sweet

- “Creating Final OER Products” (May) facilitated by Dan Matthews

CARLI U.S. Department of Education Open Textbook Pilot Grant Application: SCOERS Grant

CARLI received a 3-year award in two disbursements equaling \$2 million for [Illinois SCOERS](#) for the creation of open textbooks and ancillary materials that include 3D printing as a pedagogical tool funded by the Open Textbooks Pilot Grant received from the Fund for the Improvement of Post-Secondary Education (FIPSE) and the U.S. Department of Education.

CARLI OER Committee members, past and present, assisted in the subgrant application submission process, reviewing the subgrant applications, and serving on the Advisory Committee including Anne Chernaik, Dan Matthews, Michelle Oh, Sue Shultz, Janet Swatscheno, Chris Sweet, Lauren Kosrow, Sharon Silverman, and DeeAnna Phares.

CARLI Preservation Committee
FY 2023 Annual Report of Activities and Projects

Members

Melina Avery	2020–2023	University of Chicago, Co-Chair
Rob DeLand	2019–2023	VanderCook College of Music
Theresa Embrey	2021–2024	Pritzker Military Library and Museum
Tonia Grafakos	2018–2024	Northwestern University
Jade Kastel	2021–2023	Western Illinois University, Co-Chair
Ellen Keith	2022–2023	Chicago History Museum
Bridget Lerette	2022–2025	Harper College
Heidi Marshall	2022–2025	Columbia College Chicago
Shelby Strommer	2022–2025	University of Illinois Urbana-Champaign

CARLI Staff Liaisons: Elizabeth Clarage and Nicole Swanson

Meetings

The Preservation Committee met 10 times during 2022-2023:

- 10 conference calls held over Zoom: August 31, September 28, October 26 and November 30, 2022; January 25, February 22, March 22, April 26, May 10, and June 28, 2023.

Activities

- Annual Project: [Archival Preservation 101](#) is a series of articles written by the CARLI Preservation Committee over the course of FY2023, designed to introduce topics in the preservation of archival material that would be of use to CARLI members.
 - **September:** [An Introduction to the Preservation of Archival Materials](#), Jade Kastel

CARLI members may often find themselves in situations where they need to familiarize themselves with archives and preservation. This series will add confidence and provide grounding in preservation issues while giving suggestions you can use for work or personal applications. We will cover how to preserve archival collections and provide suggestions to fund preservation projects.

- **October:** [Preservation Through Archival Practice](#), Heidi Marshall
Archival materials found within each CARLI institution showcase history, creativity, and scholarship in Illinois through the materials each retains. Learn a few guiding principles of which to be aware for anyone preserving and maintaining archival materials including original order and provenance. These

two concepts govern archival work and preserve the integrity of the records themselves.

- **November:** [Funding for Preservation Activities](#), Ellen Keith
Preservation work has funding needs just like any other library activity. Learn about the big-ticket items associated with preservation as well as the ongoing costs of running a conservation lab.
- **December:** [Preservation Through Simple Archival Processing](#), Heidi Marshall
Archives processing serves to preserve materials by following the guiding principles of provenance and original order. Archivists use arrangement performed through appraisal to gain both physical and intellectual control of the items. These processes serve then to preserve the items.
- **January:** [Email Archiving](#), Shelby Strommer
Email messages can be a vital part of the historical record. Learn how email archiving presents some unique policy, workflow, and technical challenges.
- **February:** [Digitization and Digital Archiving](#), Rob DeLand
Digital content has exploded in recent years as processing and storage costs have come down and demand has increased. Digitization comes with new responsibilities. These include digitization planning, format decisions, and organization of digital objects.
- **March:** [Cloud vs. Physical \(Local\) Storage](#), Bridget Lerette
Cloud and physical storage each offers advantages and disadvantages for the digital preservation of archives and special collections; the selection between the two will be dependent on the needs and resources of the institution.
- **April:** [Preservation of Digital Materials](#), Tonia Grafakos
An interview with Kelsey O'Connell, Digital Archivist at Northwestern University, who shares how institutions can preserve their digital collections.
- **May:** [Preservation of Video Games in Libraries](#), Melina Avery
Learn how video games as well as the history of game play are preserved and taught at the University of Chicago's Weston Game Lab at the Media Arts, Data and Design (MADD) Center.
- **June:** Wrap-Up of Archival Preservation 101 Series, Jade Kastel
- Maintained and updated the [Preservation Resources webpage](#)
- Shared Preservation Week activities including UIUC Library's free webinars "[Film Inspection and Handling 101](#)" and "[Fundamentos de la Inspección y Conservación de Películas.](#)"
- Began discussion of future in-person events including rescheduled tours of Chicago CARLI libraries and publicizing a disaster planning event at Northwestern in fall 2023, in partnership with AIC's Alliance for Response.

Respectfully submitted by

Melina Avery (University of Chicago) and Jade Kastel (Western Illinois University)

Co-chairs, 2022-2023

**CARLI Public Services Committee:
FY 2023 Annual Report of Activities and Projects**

Members

Name	Term	Institution
Steve Brantley	2022-2024	Eastern Illinois University
Chad Kahl	2018-2023	Illinois State University (co-chair)
Jennifer Lau-Bond	2022-2025	Harper College
Katie Maier-O'Shea	2022-2023	North Park University
Ashley McMullin	2021-2024	DePaul University
Anne Shelley	2022-2023	Illinois State University
Arlie Sims	2021-2024	Columbia College Chicago
Simone Williams	2022-2025	Southern Illinois University Edwardsville
Lesley Wolfgang	2022-2025	Saint John's College of Nursing (co-chair)

CARLI Staff Liaisons: Elizabeth Clarage and Denise Green

Meetings

The Public Services Committee met 10 times by conference call and held one in-person committee meeting at Milner Library at Illinois State University.

Activities

During FY23, the Public Services Committee investigated the state and future of academic library public services.

The Committee developed and distributed a survey on January 30, 2023, via several CARLI email lists. The survey received 95 responses.

The survey asked about types of public services provided; discontinuation of public services; which public services have been added; efforts at improving accessibility and inclusivity of public services; change in staffing and new positions in public services in prior decade; and projections on the near future of public services.

The Committee selected one aspect of the survey to concentrate on and conducted a panel discussion, *Inclusive and Accessible Public Services: An Open Discussion* on May 4 on Zoom for 59 participants. Lesley Wolfgang moderated. The program received feedback via an evaluation survey, which received 12 responses:

- The content covered what participants thought would be covered: 5 strongly agree, 3 agree
- The session was a valuable use of time: 5 strongly agree, 4 agree

The [introductory panel presentation slides](#) and [notes](#) were made available on the CARLI website.

Additionally, due to the March 24, 2023 decision in the case, Hachette v. Internet Archive, in regard to the practice of Controlled Digital Lending (CDL), which was the subject of the Committee's 2022 work, the 2021-2022 resource guide, [Resources about Controlled Digital Lending](#), was updated.

Respectfully submitted,
Members of the 2022-2023 CARLI Public Services Committee

Attachments:

- CARLI Public Services Survey rev 20230310.pdf
- Public_Services_Survey_2023.pdf



Consortium of
Academic and Research
Libraries in Illinois

Dear CARLI Library staff member:

Thank you for taking time to complete this questionnaire about public services (as defined by your institution) in your library. The information you share will help us plan a program to occur in Spring 2023.

Multiple responses from an institution is fine and encouraged. Please share the survey with your CARLI colleagues.

The results of the survey will be anonymized; however, if you are interested in discussing your experiences, you will have an opportunity to share your contact information (see below). We estimate this survey can be completed in 10 minutes.

1. What types of public service(s) do you provide at your library? (select all that apply)

- Access Services
- Reference
- Instruction
- Outreach/Engagement
- Scholarly Communications
- Data Services
- Other (please specify)

2. Are there any specific public services that your library has chosen to discontinue?

- Yes
- No



Consortium of
Academic and Research
Libraries in Illinois

Discontinued Public Service(s) Questions

3. Please share the public service(s) that has/have been discontinued:

4. What were the benefits to discontinuing this/these service(s), if any?

5. What were the challenges to discontinuing this/these service(s), if any?

6. How did you make the decision to discontinue this/these public service(s)? (select all that apply)

- Data
- Student/Faculty Input
- Budget Recessions
- Observation
- Other (please specify)



CARLI

Consortium of
Academic and Research
Libraries in Illinois

New Services Questions

7. Have you recently chosen to add any new public services?

Yes

No



CARLI

Consortium of
Academic and Research
Libraries in Illinois

New Public Services Questions 2

8. Please share the public service(s) that has/have been added:

9. What were the benefits to adding the new service(s), if any?

10. What were the challenges to adding the new service(s), if any?



CARLI

Consortium of
Academic and Research
Libraries in Illinois

11. Have you made, or do you plan to make, your public services more inclusive and accessible?

No

Yes, please describe:

12. How has the number of public services' library staff changed over the past 10 years?

13. What new positions, if any, has your library created in public services in the past ten years?

14. Have you recently changed or do you plan to change your staffing models for providing reference and/or blended services?

No

Yes, please explain:


15. What programs, services, outreach, etc. are you most looking forward to in your library this year?

16. How do you see Public Services evolving in your library over the next five years?

17. Would you be willing to speak with a member of the CARLI Public Services Committee about your experiences? If so, please provide your contact information.

No

Yes, please provide your full name and email.



Inclusive and Accessible Public Services: A Discussion

Welcome!

This program will begin at 11:00 a.m. and conclude at Noon.

Everyone's microphone is muted.

Questions are encouraged throughout the program via the chat box. We will try to answer as many questions as possible at the end of our program.

Access Zoom's live transcript at the bottom of the Zoom window on the CC icon's arrow menu by selecting View Full Transcript or Show Subtitles.

1



Inclusive and Accessible Public Services: A Discussion

This program was developed by the CARLI Public Services Committee

- Steve Brantley, Eastern Illinois University
- Chad Kahl, Illinois State University
- Jennifer Lau-Bond, Harper College
- Katie Maier-O'Shea, North Park University
- Ashley McMullin, DePaul University
- Anne Shelley, Illinois State University
- Arlie Sims, Columbia College Chicago
- Simone Williams, Southern Illinois University Edwardsville
- Lesley Wolfgang, Saint John's College of Nursing
- CARLI Staff Liaisons: Elizabeth Clarage and Denise Green

2



Consortium of
Academic and Research
Libraries in Illinois


Inclusive and Accessible Public Services: A Discussion

- Welcome and introduction
- Overview of Public Services Survey
- Informal Discussion and Q&A

A reminder that this not being recorded but notes are being taken by the committee for sharing.

This a very popular program with over 90 registrants, so we will do our best to answer questions that are posted to the chat.

3



Consortium of
Academic and Research
Libraries in Illinois

Inclusive and Accessible Public Services: A Discussion

Public Services Survey – CARLI Public Services Committee released in Jan. 2023; 95 responses received

- What the PSC wanted to learn:
 - New public services vs. discontinued services;
 - Public services staffing changes;
 - How public services might evolve over the next five years
 - Improvements to inclusivity and accessibility in public services

4



5

Consortium of Academic and Research Libraries in Illinois

Inclusive and Accessible Public Services: A Discussion

Public Services Survey results

What new public services have been added recently?

- new or expanded virtual reference and/or instruction (4 responses)
- equipment and/or technology checkout options (4 responses)
- innovation/maker space (3 responses)
- new or expanded textbook program/reserves (2 responses)

Public service(s) that have been discontinued

- Physical reference desk removed (4 responses)
- Reduced hours (2 responses)
- Data librarianship (2 responses)
- Outreach/Engagement librarianship (2 responses)
- Print reserves: switch to online reserves only (2 responses)

6




Inclusive and Accessible Public Services: A Discussion

Public Services Survey results

Have you made, or do you plan to make, your public services more inclusive and accessible?

- Improved accessibility for library web site, social media, and/or digital learning objects (13 responses)
- Expanded public awareness efforts and welcoming environment (7 responses)
- Expanded collaboration with accessibility and/or diversity, equity, inclusion campus units (6 responses)
- Added/renovated library space for improved accessibility (5 responses)
- Diversity audits/increased focus in collection development (4 responses)
- Accessibility training for public services (4 responses)
- Added library accessibility positions (e.g., IDEA coordinator) and/or committees (3 responses)
- Recruit more BIPOC library workers (2 responses)
- Expanded reference options (e.g., chat, video, online consultations) (2 responses)
- Expansion of engagement/programming activities (2 responses)
- Collaboration with campus academic and/or student success units to provide one-stop options for students (2 responses)
- Highlighting of resources for community patrons that are free and accessible (2 responses)
- Updated assistive technologies (2 responses)

7



Inclusive and Accessible Public Services: A Discussion

Public Services Survey results

What new positions, if any, has your library created in public services in the past ten years?

- Outreach/Engagement/Programming Librarian/Specialist (10 responses)
- Access/Circulation Librarian/Specialist (8 responses)
- Reference and Instruction/Information Literacy (4 responses)
- Public Services Librarian/Staff (3 responses)
- Health Sciences (2 responses)
- Learning Commons (2 responses)
- OER Librarian (2 responses)
- Technology/Systems (2 responses)
- Assessment and Scholarly Communication (1 response)
- Data Literacy (1 response)
- Digital Librarian (1 response)

8



Inclusive and Accessible Public Services: A Discussion

Public Services Survey results

What programs, services, outreach, etc. are you most looking forward to in your library this year?

- Engagement/Events/Gatherings/Outreach/Programming (22 responses)
 - art events, book clubs and common reads, competitions and contests, displays, exhibits, LEGO events, scavenger hunts, therapy dogs
- Instruction focus (6 responses)
- Accessibility and/or diversity, equity, inclusion campus focus (4 responses)
- Community Outreach to public library/schools (4 responses)
- Reference focus (4 responses)
- Collections focus (3 responses)
- OER/Textbook focus (2 responses)

Resource Sharing Committee Annual Report 2022-2023

Members:

Elena Carrillo, University of Illinois Chicago
Marissa Ellermann, Southern Illinois University Carbondale
Sarah Henderson, Monmouth College
Sarah Hoeksema, Trinity Christian College, Co-Chair
Alia Lizotte, Millikin University
Joshua Newport, Illinois State University
Janelle Sander, University of Illinois Urbana-Champaign
Ashtin Trimble, Black Hawk College, Co-Chair
Julia Venetis, College of DuPage

CARLI Staff Liaisons:

Debbie Campbell
Bradley Woodruff

Meetings

All of our meetings took place via Zoom. Our regular meeting time was the fourth Thursday of every month from 9:30 am - 11 am.

Completed Terms

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

- Sarah Hoeksema, Trinity Christian College, 2021-2023, co-chair 2022-2023
- Alia Lizotte, Millikin University, 2022-2023
- Ashtin Trimble, Black Hawk College, 2018-2023, co-chair 2022-2023

During the May 25, 2023 meeting, the Committee selected the committee co-chairs for the FY24 year: Marissa Ellermann, Southern Illinois University Carbondale and Sarah Henderson, Monmouth College.

Committee Charge

The CARLI Resource Sharing Committee works with the CARLI staff and members to identify, develop, and encourage cooperation and collaboration in sharing the full depth and breadth of the consortium's collective resources. The committee will identify efficient and cost-effective best practices. The Resource Sharing Committee will

collaborate with other CARLI committees and ad hoc groups to discuss issues of common interest and to facilitate joint program planning.

The committee may be assigned projects by the Board of Directors, or may independently develop projects and initiatives within the scope of its charge or in collaboration with other ad hoc groups. The Resource Sharing Committee acknowledges historical, structural, and systemic injustice, values the principles of diversity, equity, and inclusion (DEI), and will ensure that CARLI's commitment to DEI is embedded in their work. The committee will identify educational and training needs within its scope of responsibility and its collaboration with other committees, and will develop workshops, seminars, webinars, or other education opportunities to meet the needs of the membership. The committee will prepare appropriate documentation and reports, and will submit an annual report of its activities and accomplishments to the Board of Directors

Theme

The committee's overall theme for this year was "Did you know...?" The webinar and discussion series facilitated by the committee was focused on introducing the consortium to Alma/PrimoVE features that have not yet been widely adopted by I-Share libraries or providing I-Share staff the opportunity to share how their department handles resource sharing-related processes.

Annual Project

Continuing the theme from the FY22 Committee, the FY23 Committee focused their work on multiple smaller projects instead of one larger research project. These projects are outlined below.

Webinars and Discussion Series

To connect with our CARLI library colleagues during the FY23 year, the committee hosted virtual group discussions facilitated by committee members and/or webinars presented by colleagues from different CARLI libraries.

Webinar: Marketing and Advertising Library Services - November 18

The CARLI Resource Sharing Committee's November Discussion focused on marketing & advertising library services and resources and the ways two different libraries approached the topic.

- Marissa Ellermann and Cherie Watson, from Southern Illinois University Carbondale, discussed their campus outreach and marketing efforts to promote traditional and new services to a variety of stakeholders using multiple strategies.
- Sarah Henderson, from Monmouth College, discussed Hewes Library's collaboration with students from the BUSI 367- Advertising class and developing advertising to reach students and promote library services.

This session with 60 registrants was recorded and posted to the CARLI website:
<https://www.carli.illinois.edu/CARLIResourceSharingCommittee221118>

Discussion Series: An End of Semester Share, Show, & Tell - December 8

The CARLI Resource Sharing Committee's December Discussion was an open conversation - An End of Semester Share, Show, & Tell. Resource sharing colleagues and CARLI staff gathered to share and learn from each other. This session was not recorded to promote a more open conversation.

The Committee prepared some starter questions to help facilitate conversation:

- How has your semester been; anything you would like to discuss or debrief?
- What is something you learned this year that you would like to share? Any tips or tricks or new workflows?
- What kind of training does your staff need? What do you want to learn about?
- How do you organize your staff workflows? Does your library have student workers?
- What is your workflow for missing items?
- How do you use receipt printers at your library?
- How does your library organize your ILDS/ILL workstation?
- Grab a beverage, bring your thoughts, questions, and feedback, and join us so we can learn together and support each other!

This session with 51 registrants was not recorded; the link to the webinar page is below:
<https://www.carli.illinois.edu/CARLIResourceSharingCommittee221208>

Webinar: Training/Supervising Student Workers- Oakton & Judson - February 22

This webinar was the first of a two-part series about training and supervising student workers. The presenters for this session included Gretchen Schneider (Oakton Community College, OAK) and Claire Salvati (Judson University, JUD).

This session with 59 registrants was recorded and posted to the CARLI website:
<https://www.carli.illinois.edu/ResourceSharingCommittee230222>

Webinar: Training/Supervising Student Workers: UIS & Millikin - March 1

This webinar was the first of a two-part series about training and supervising student workers. The presenters for this session included Erich O'Connor (University of Illinois-Springfield, UIS) and Liz Hollendonner (Millikin University, MIL)

This session with 66 registrants was recorded and posted to the CARLI website:
<https://www.carli.illinois.edu/ResourceSharingCommittee230301>

Discussion Series: Share, Show, and Tell: Electronic Reserves - March 31

The CARLI Resource Sharing Committee's March Discussion was an open conversation - Share, Show, & Tell: Electronic reserves. Resource sharing colleagues and CARLI staff gathered to share and learn from each other about how their library manages electronic resources. This session was not recorded to promote a more open conversation.

The Committee prepared some starter questions to help facilitate conversation:

- Does your library support eReserves? Why or why not?
- What is your eReserves workflow?
- What technologies are you leveraging to provide this service?
- What are the challenges to offering this service?
- What barriers are preventing libraries from offering this service?

This session with 65 registrants was not recorded; the link to the webinar page is below:

<https://www.carli.illinois.edu/ResourceSharingCommittee230331>

Webinar: The Alma Batch Inventory Tool - May 3

The CARLI Resource Sharing Committee hosted a two-part series on different inventory tools and Alma.

The first webinar focused on the Alma Batch Inventory Tool, presented by Colleen Turkal and Abigail DeWeese from Principia College.

This session with 84 registrants was recorded and posted to the CARLI website:

<https://www.carli.illinois.edu/resource-sharing-committee-alma-batch-inventory-tool>

Webinar: Alma Shelf Report and the Alma Interactive Inventory Scanning Tool - May 9

The CARLI Resource Sharing Committee hosted a two-part series on different inventory tools and Alma.

The second webinar focused on two different libraries' approaches to the Alma Shelf Report and the Alma Interactive Inventory Scanning Tool, presented by Stacey Haas and Tammie Busch from SIUE and Stacey Knight Davis from EIU.

This session with 94 registrants was recorded and posted to the CARLI website:

<https://www.carli.illinois.edu/resource-sharing-committee-alma-shelf-report-and-alma-interactive-inventory-scanning-tool>

Monthly Alma and Primo VE Release Notes Review

Committee members took turns reviewing quarterly Alma and Primo VE release notes, one in November, 2022 and one in February, 2023. Members highlighted any upcoming changes that would impact resource sharing processes and workflows. Any relevant changes were documented and shared with the committee.

<https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/ResSharReleaseNoteReview>

Alma and PrimoVE testing and troubleshooting

During the FY23 year, the committee led and assisted the CARLI office staff in testing and troubleshooting many aspects of Alma and Primo. The tasks and topics include:

- Return Receipts for I-Share Loans
 - The committee has made the recommendation that the return receipt functionality should be turned on for all I-Share loans.
 - As of May 2023 before this decision was enabled in Alma, Ex Libris modified Alma functionality so that the patron's return institution generates the return receipt, instead of the item's owning library generating the receipt. The committee will revisit this functionality in the fall of 2023.
- Quarterly Borrowing Activity Letters
 - The committee has recommended sending out quarterly borrow activity reports to I-Share patrons
 - The schedule of these quarterly reports is still to be determined, as is the communication to I-Share libraries.
- Check Patron Duplicate Borrowing Requests
 - Discussed in FY22, the committee made the recommendation to have the CARLI office staff adjust this setting in configuration to "false" to allow patrons to request multiple copies of the same title.
 - This change was scheduled to take place in fall 2022. However, final testing before it went live demonstrated that the feature was no longer functioning correctly.
 - The committee has been awaiting a response from ExLibris support, and until then this task is on hold.
- Manual block type 5 and consortial overdue blocks
 - The committee has held meetings with live group testing.
 - There is still much to be learned about this functionality before final recommendations can be made.
- Grey-out request button in Primo VE

- In an effort to decrease the number of request cancellation notices I-Share users were receiving, the committee helped test the feature that grays-out the Request button in PrimoVE for users when no items are requestable.
- The committee helped with the default language that appears when the button is grayed-out.
- UIU, UIC, and MON libraries volunteered to test the solution before it was made available to all I-Share libraries.
- Expiration date on Hold Shelf Request Slip
 - The format of the Hold Shelf Request Slip was edited to have the hold shelf expiration date appear in bold at the top of the slip.
- Updated wording and format for Hold Shelf Letter
 - The original hold shelf letter was confusing to some patrons as the letter contained both the lending library and the pick-up library information.
 - The letter was simplified to include only the pick-up library's information
- I-Share Requesting Over Winter Break
 - I-Share libraries were surveyed in November 2022 if they preferred to have I-Share requesting paused over winter break (allowing patrons to make requests while the library is closed) or stopped over winter break (not allowing patrons to make requests until the library re-opens).
 - Based on survey responses, the committee made the recommendation to pause I-Share requesting this year and make pausing the regular practice moving forward.
- Automatic Renewals
 - This topic was carried over from FY22.
 - There is consortial interest in automatic renewals. However, based on the findings of an October 2021 survey, I-Share member libraries would prefer to wait to go live with this feature until there is a patron letter that informs them that the item has been automatically renewed.
 - The committee continues to monitor the feasibility of Alma sending the patron a letter that their item was auto-renewed.
- Preferred Names on Hold Slips and Letters
 - The committee recommended that patrons' preferred first and last names should be used on hold slips and letters.
- Mandatory Fields for User Records
 - The address field is mandatory for I-Share libraries, but is not a required field in Alma.
 - A few I-Share libraries have shared their preference to no longer make this field mandatory.
 - The committee recommended at the February 2023 meeting that the address field should remain mandatory, but the address could be the home library address in lieu of the user's home address.

**2022-2023 CARLI Technical Services Committee:
Annual Report of Activities**

Members:

Tammie Busch, Southern Illinois University Edwardsville, Co-Chair
Jodi Craiglow, Trinity International University
Brent Eckert, Rock Valley College
George Gottschalk, University of Illinois Urbana-Champaign
Susan Howell, Southern Illinois University Carbondale, Co-Chair
Robin Mize, University of Illinois at Springfield
Lauren Noel, Columbia College Chicago
Renata Schneider, DePaul University
Jackie Zook, Northeastern Illinois University

CARLI Staff Liaisons:

Jen Masciadrelli
Ted Schwitzner

2022-2023 Accomplishments:

- **OCLC Connexion Q & A Sessions**

The cataloging survey created and disseminated by last year's Technical Services Committee (TSC) identified an interest in Connexion training opportunities. In response, this year's TSC committee offered Q & A sessions following participants' viewing of OCLC Connexion Client training modules offered by OCLC. The following modules were offered:

Connexion client

Recorded live training

- [Module 1 - WorldCat, MARC, and client basics](#)
- [Module 2 - Basic bibliographic searching](#)
- [Module 3 - Basic editing and record processing](#)
- [Module 4 - Save files, file management, and batch processing](#)
- [Module 5 - Automation and customization](#)
- [Module 6 - Editing WorldCat records](#)
- [Module 7 - Advanced bibliographic searching](#)
- [Module 8 - Original cataloging](#)
- [Module 9 - Authority control](#)

One committee member took one of each of the modules to be the point facilitator of the Q & A session, and one committee member volunteered to monitor the chat. Two modules were presented

in one Q & A session with the exception of Module 9: Authority Control which had its own session. Each Q & A session was ninety minutes long. The moderator presented highlights from the OCLC Connexion Client modules and answered participants' questions.

Upon completion of the series, the committee developed a survey instrument and distributed it to registered participants and the CARLI Technical Services email list. The results are still pending analysis. Please see Appendix A for the survey instrument.

https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_training/Connexion_client_live_and_recorded_classes

- **Continuing work on the previous committee's Best Practice's Document**

This year the TSC continues to review the previous committee's Best Practices Document. Each committee member went through and added comments to the document and also provided feedback as to what parts of the document were more relevant to policy and what parts were more practices. Documentation from other consortiums such as Orbis Cascade were reviewed. The document then went back to CARLI staff for feedback and input. The result is Cooperative Cataloging Policies for I-Share, which can be found in Appendix B of this Report.

This document will be presented to the CARLI Board of Directors in June for Approval.

- **Ethical Cataloging**

Reparative cataloging remains a topic of concern for the TSC. After reviewing the pilot project and recommendations of the 2021-2022 TSC DEI Subcommittee regarding changing offensive subject heading display in PrimoVE, the current TSC decided this work should continue but should be guided with input from CARLI and CARLI libraries by way of a committee or working group. The TSC created a recommendation report for this important work. (Appendix C: "A Recommendation for Reparative Cataloging Work from the CARLI Technical Services Committee")

- **Collaborative Database Maintenance Work**

Andrew Belongea (Columbia College Chicago) from the CARLI Discovery Committee attended the TSC meeting on March 23, 2023 to get feedback on his committee's work. One of the topics he discussed was incorrect coding of the MARC 007 field and how this impacts discovery. Andrew demonstrated how Alma indication rules could be used to identify records with incorrect coding. He also shared with the TSC indication rules he created for audio CDs, audio LPs, audiocassettes, Blu-rays, and DVDs. The TSC saw this as an opportunity to collaborate with the Discovery Committee by using these indication rules to identify and correct records with incorrect 007 fields. The committee requested additional training on indication rules from Ted Schwitzner who obliged by holding two workshops on creating and running indication rules on the 007 field and the workflow to correct these records. As of April 27, 2023, TSC members had reported correcting over 500 audio CD record and over 200 DVD records in the Alma NZ. This work also prompted a discussion of the TSC on the need to prioritize additional database maintenance project in the future.

Future Plans:

The TSC will continue meeting in FY24. The Technical Services Committee will review survey results from participants in the OCLC Connexion Module Q & A sessions, and discuss any suggestions for future training. The TSC began a conversation about updating the CARLI document “Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance.” This document is specific to Voyager and should be revised to a prioritized list of database clean-up activities in Alma. Prioritizing the updating of this document would benefit CARLI members.

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

Appendix A

CARLI Technical Services Committee Connexion Client Sessions Evaluation

1. You registered for one or more sessions from the CARLI Connexion Client Training Q & A Series. How many sessions did you attend either in person or by watching the recording?

- 0
- 1
- 2
- 3
- 4
- 5

CARLI Technical Services Committee Connexion Client Sessions Evaluation

2. Did you complete the OCLC Connexion Client training module prior to the session(s) you attended?

-
- Yes
-
- No
- Some of them

CARLI Technical Services Committee Connexion Client Sessions Evaluation

3. How helpful did you find OCLC Connexion Client training modules?

- Very unhelpful
- Unhelpful
- Neutral
- Helpful
- Very Helpful
- Other (please specify)

CARLI Technical Services Committee Connexion Client Sessions Evaluation

4. What did you find most helpful from the CARLI Q & A session(s) you attended? Please select all that apply.

- Group learning environment
- Real time Q & A format
- Informal setting
- Practical advice from peers
- Connexion client demonstrations
- Other (please specify)

5. Are there specific topics from the OCLC Connexion Client Training modules you would like to learn more about? Please select all that apply.

- WorldCat, MARC and client basics
- Basic bibliographic searching
- Basic editing and record processing
- Save files, file management, and batch processing
- Automation and customization
- Editing WorldCat records
- Advanced bibliographic searching
- Original cataloging
- Authority control
- Other (please specify)

6. For each of the following indicate your level of agreement on the rating scale.

	Strongly agree	Somewhat agree	Neutral	Somewhat disagree	Strongly disagree
This format was different from other presentation formats in that you were asked to watch a video and a live review session. I found this format for learning about Connexion effective.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I learned something new in at least one of the sessions I attended.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have been able to apply what I learned to some aspect of my work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have used this knowledge to enhance or improve a workflow.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Do you have any additional comments or suggestions?

Cooperative Cataloging Policies for I-Share

May 25, 2023

I-Share is an online catalog and library management system operated by and for the Consortium of Academic and Research Libraries in Illinois (CARLI) to support library resource sharing among participating member institutions. Traditionally, CARLI and I-Share participants embrace a broad definition of resource sharing, ranging from reciprocal borrowing among libraries and their patrons, to sharing of bibliographic and collection data, to the development and sharing of expertise.

The [CARLI I-Share Participant Institution Agreement](#) outlines the terms for institutional participation in I-Share and the responsibilities of participating institutions. These terms include that a participant shall, “Provide and maintain current bibliographic data in I-Share describing the library’s collection, holdings and item availability status in acceptable formats and quality standards,” according to the instructions in this document.

I-Share participants, also referred to here as member libraries, build and maintain a collaborative catalog by coordinating data, streamlining workflows in the management of resources, and keeping information consistent across institutions. The Alma I-Share Environment consists of three zones that serve as repositories for different types of metadata and library workflows.

- Institution Zone (IZ). Each I-Share member operates with its own Institution Zone that consolidates library data with configurations and workflows for routine library operations. Within an IZ, bibliographic metadata are shared across the institution, with inventory data managed at library level.
- Network Zone (NZ). I-Share member libraries collaborate with each other via the Network Zone (NZ). Primarily, member libraries contribute bibliographic records for their collections to the NZ, with the metadata for such records shared among all members. Enabling other members to link data on acquired resources to existing consortial records benefits all I-Share patrons by presenting more consistent experiences in locating and accessing the resources they need. Additionally, CARLI uses the NZ to distribute a common set of metadata for consortially-managed electronic resources, managing data at scale instead of duplicating effort in each member library.
- Community Zone (CZ). The Alma Community Zone (CZ) is a shared repository of metadata and link-resolver data for the Alma community, which includes CARLI and I-Share member libraries. Community members participate in providing and maintaining CZ metadata as a possible source of bibliographic metadata and a means to manage data and workflows collaboratively.

As stewards of shared consortial data, I-Share member libraries should adhere to the following policies and standards for cataloging physical and electronic collections in the I-Share Environment.

- I. I-Share member libraries will be members in good standing of OCLC. This entails the following obligations:

1. Familiarity and compliance with OCLC's [WorldCat Principles of Cooperation](#).
 2. Represent holdings in WorldCat for permanent physical and electronic collections.
 3. Enhance and correct records in WorldCat following OCLC [Bibliographic Formats and Standards](#). Minimally, member libraries should report errors found in WorldCat records.
 4. Original cataloging performed in WorldCat following OCLC [Bibliographic Formats and Standards, Chapter 4, "When to input a new record."](#)
- II. I-Share member libraries will contribute cataloging data that accurately describe their physical and electronic collections following current descriptive and technical standards. These include the following formats and accompanying standards.
1. Full-level cataloging. Descriptions shall meet the definition of "full-level cataloging" established by OCLC Bibliographic Formats and Standards, which "[seeks to ensure inclusion of the essential data elements necessary to meet user needs.](#)" OCLC Bibliographic Formats and Standards applies the requirements of RDA or AACR2 second-level description to the MARC21 Format for Bibliographic Data.
 2. Cataloging record sources. Member libraries may use records from WorldCat, the Alma Community Zone, or other sources. The quality and completeness of records in I-Share catalogs should meet the standards described in this document.
 3. Authorized access points. Headings for names and subjects should conform to the Library of Congress authority files or other nationally recognized thesauri. New authorized access points should be constructed to be compliant with RDA.
 4. Single record per manifestation. Contribute only one record per manifestation to the I-Share environment. In practical terms, only one copy of a record with the same OCLC number should be present in the NZ and/or IZ.
 5. Provider-neutral records for electronic resources. Use a single bibliographic record to describe multiple online manifestations of a resource, regardless of which publisher or aggregator is making the content available. The description should apply only to equivalent manifestations of the same expression; substantial (not just incidental) differences may indicate a different expression, which should be described in a separate record.
 6. Holdings statements for physical inventory. Holdings descriptions shall accurately describe the extent of the member library's physical holdings in each location where resources are present using the MARC 21 Format for Holdings Data and ANSI/NISO Z39.71 Holdings Statements for Bibliographic Items.
 7. Details for accessing electronic inventory. Holdings for electronic inventory will be accessible by link resolver objects or portfolios in Alma; bibliographic MARC 856 fields should not be used for access.
 8. Digital objects. If a member library chooses to add metadata for digital objects to its IZ, descriptions for these objects should conform to applicable standards for digital resources, such as Dublin Core, MODS, METS, or other field- or format-specific schemas. *Member libraries may not use I-Share as a digital object repository without a contract for Alma-D.*

- III. I-Share member libraries will collaborate with CARLI and other libraries to identify and improve the accuracy and completeness of shared catalog data, and they will respect the effort of other member libraries.
1. Quality control and routine library data maintenance. Each I-Share member library shall follow a plan for quality control and routine maintenance of data. At a minimum, libraries should act in accordance with any priorities that CARLI recommends for data maintenance.
 2. CARLI consortial data maintenance. CARLI Staff will periodically perform maintenance activities in the NZ and as needed in IZs on behalf of member libraries. Consortial maintenance activities may consist of updates to authorized access points, corrections to invalid data, localizing institutional data from the shared record, merging and/or relinking of duplicate bibliographic records, and other maintenance priorities as identified by CARLI Staff, CARLI Committees, or member libraries.
 3. Do no harm to existing records. Make no changes to a full-level record that causes the record to represent a different work, expression, or manifestation than the record already describes. When in doubt whether a difference in your item constitutes a difference in the existing record, consult OCLC [Bibliographic Formats and Standards, Chapter 4, "When to input a new record."](#)
 4. Retain access points. Retain in records any access points that may be valid under different vocabularies, including those for non-English language vocabularies. Member libraries may opt to configure Primo VE to display only selected vocabularies.
 5. Withdrawn records. Member libraries will [withdraw and delete records](#) when the library has removed all existing inventory.
- IV. Bibliographic records for I-Share member libraries' permanent collections should be shared with the network to improve consortial data on holdings. These data support consortium-wide discovery, copy cataloging, resource sharing, and collection retention.
1. Search the I-Share Network Zone for candidate bibliographic records and use an appropriate record found there first before importing a "new" record from another source.
 2. Member libraries should routinely identify unlinked IZ bibliographic records and attempt to link or contribute these records to the NZ.
- V. I-Share member libraries may retain bibliographic records in their Institution Zone only (i.e., remain unlinked from the Network Zone) under the following limited circumstances. Member libraries may apply lesser cataloging standards than "full-level cataloging" to unlinked records, and these resources may still be discoverable via the "All I-Share Libraries" search slot in Primo VE.
1. Records for temporary collections (e.g., course reserves, personal copies, rental collections)
 2. Brief records that describe equipment and other loanable technology may remain unlinked from the network.

3. Records contractually restricted from sharing. Vendors may provide a member library with catalog data but restrict sharing of records only to libraries that also utilize their service. Such records should remain in the Institution Zone only.
 4. Records for interlibrary loan items. Records for materials on loan from other libraries may be added, automatically or manually, to the Institution Zone. Such records should remain suppressed from discovery. These records should be removed from the Institution Zone after the loan is concluded, and these records should never include any personal information about the borrower.
- VI. Bibliographic control numbers are essential to effective duplicate control and necessary for many types of automated maintenance. Record matching between IZ and NZ is based on the OCLC system number. Member libraries should choose records that contain OCLC control numbers whenever possible. If OCLC control numbers are not present, prefer records that contain another system control number that identifies the record uniquely (e.g., ISBN, ISSN, vendor control number, vendor title number, etc.).
- VII. Copy-specific details. Member libraries should record copy-specific details in institution-level inventory records, such as holdings and items or portfolios, and selectively in bibliographic local extensions.
1. Call numbers. Call numbers for specific copies should be included in the holding record classification and item number fields (i.e., 852 subfields h & i) to display this information to patrons via item displays and print outs. *Optionally*, when a member library's local practices entail including the call number in a bibliographic record, use a local extension 09X field.
 2. Notes. Additional descriptive details specific to a member library's copy should be included in the holding record notes fields and item record notes fields. If enhancing the bibliographic description as well, enter these notes in local extension 59X or 9XX fields.
 3. Locally-relevant access points. Authorized access points that pertain to member library collections (e.g., collection names, local authors, etc.) should be included in local extension 69X fields.

History of this document

- Approved by the CARLI Governance Board, XXXXXXXX
- Prepared by CARLI Staff and the CARLI Technical Services Committee, May XX, 2023. This document is the unification of two previous documents: the Cooperative Cataloging Guidelines for I-Share, and the Standards for Bibliographic Records in I-Share.

History of the Cooperative Cataloging Guidelines for I-Share document

- Endorsed by the CARLI Board of Directors March 13, 2015.
- Updated December 2014 by the Technical Services Committee to incorporate RDA and other new protocols.

- Updated August 2010 by the I-Share Cataloging and Authority Control team to incorporate recommendations from the Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009).
- Updated October 2006 by the I-Share Cataloging and Authority Control Team to incorporate consortial and system name changes.
- Approved by the ILCSO Board of Directors April 12, 2004.
- Approved by the ILCSO Users' Advisory Group (IUAG) March 12, 2004.
- Prepared by the IUAG Consortial Cataloging and Authority Control Committee February 2004.

History of the Standards for Bibliographic Records in I-Share document

- Endorsed by the CARLI Board of Directors March 13, 2015.
- Updated December 2014 by the CARLI Technical Services Committee to incorporate RDA and other new protocols.
- Updated October 2006 by the I-Share Cataloging and Authority Control Team to incorporate consortial and system name changes.
- Approved by the ILCSO Board of Directors December 5, 2003
- Approved by the ILCSO Users' Advisory Group (IUAG) September 5, 2003
- Proposed by the IUAG Consortial Cataloging and Authority Control Committee August 2003
- USING THE OCLC CATALOGING SUBSYSTEM IN ILLINOIS* October 1989
 - As revised by Arnold Wajenberg, University of Illinois at Urbana-Champaign and Don E. Wood, Southern Illinois University at Carbondale (October 1989)
 - *Originally Based upon Illinois OCLC Users' Group STANDARDS FOR (OCLC) INPUT CATALOGING (October 1983)

DRAFT

Appendix C. A Recommendation for Reparative Cataloging Work from the CARLI Technical Services Committee

The problem we are trying to solve

Our library catalogs contain metadata that is historically inaccurate, offensive, discriminatory, or harmful. Librarians across the world are committing to updating racist or outdated catalog records. The CARLI Technical Services Committee feels strongly that CARLI libraries should commit to this work too.

A brief review of reparative work by libraries and consortium

Most reparative and ethical cataloging and metadata work has been done at the library level. The Claremont Colleges Library's (System) Inclusive Metadata Taskforce has done some work across their System such as creating a [Statement of Principles for Inclusive Description](#) and [Guidelines for Inclusive Description](#).

George Mason Universities Libraries initiated a collaborative effort to address ethical and anti-oppressive metadata between their catalogers and archivists. They attribute the encouragement of their work to their university president—a reminder of the need for administrative support for this work to be most successful. Their group is open to additional membership, including those from other departments. Their work has been focused on “clearly-defined projects, with measurable results visible to the GMU community.”

<https://digitalcommons.du.edu/cgi/viewcontent.cgi?article=1487&context=collaborativelibrarianship>

Orbis Cascade Alliance (Consortium) is a good model for this work at the consortium level. They are actively engaged in ongoing work providing alternative subject headings for controversial subject headings in the Alliance shared ILS. This work has been done by committees made up of technical services library staff but informed by community-wide review and surveys of consortium members.

- A timeline of their work:
 - November 2019—Creation of a [discussion paper](#) by the Alliance Cataloging Standing Group (CSG) regarding controversial LCSH in the Alliance shared ILS. This paper considered the complexity of this work and weighed the pros and cons of local subject headings.
 - June 2020—[Recommendation to implement an Alliance-wide alternative to the LCSH “Illegal Aliens” subject terminology](#). This recommendation was based upon input from Alliance membership including community-wide review and the discussion paper mentioned above. Results from a community-wide survey in April of 2020 were also used to create this recommendation.

- January 2021—Announcement of LCSH changes in Shared ILS (SILS). [Orbis Cascade Alliance Changes to “Illegal aliens” Library of Congress Subject Headings](#)
- 2021—Creation of [Guidelines for Addressing Bias in Archival Description and Catalog Records](#) by Unique and Local Content Program in the Shared ILS Standing Group (UMSILS) that can be adapted and used for descriptive records beyond unique materials.
- 2022—[Survey on the use and implementation of alternative controlled vocabularies among Alliance institutions report](#). This survey investigated the use and interest in alternative controlled vocabularies, which vocabularies to pursue, and what type of guidance is needed.
- October 2022—Collaboration initiated with Unique Materials in the Shared ILS (UMSILS) standing group and the Normalization Rules Standing Group (NRSRG) to develop a framework for using alternative vocabularies in cataloging/metadata records. <https://trello.com/c/p743NjpV>

The work CARLI has completed

During 2021-2022, the Technical Services Committee created a DEI Subcommittee with the goal of exploring solutions for two issues: changing the existing offensive subject headings display and highlighting minority and underrepresented authors.

Their first goal, changing the existing offensive subject heading display, involved taking advantage of built-in functions of Alma and Primo VE. The Committee focused on the list of [subject headings relating to noncitizens provided by OhioLink](#) for this proof of concept. The first option investigated was using Display Normalization and Bib Normalization together (this is option used by the SUNY consortium). This allows the preferred language to display to users by using display normalization (removes the display of objectionable headings in Primo VE); It also allows for searching of the preferred terms by patrons.

The second option was to use DEI Exclude and Bib Normalization together. This removes the objectionable terms from display, and with the addition of the preferred terms in the database with the bib normalization the terms will display and be searchable in Primo VE. Using this option also changes CDI records and Community Zone record display. The testing of these options was accomplished on I-Share Premium Sandboxes as to not change the display in any live database.

The Committee determined that further research was needed, especially in relation to doing this work in the Network Zone. As I-Share is in a network environment, all records linked to the network will be affected and therefore the impact of this work needs to be evaluated in order to devise a process for including alternative thesauri.

The second goal involved the use of the MARC field 386. As this field does not currently display in PrimoVE, the issue was referred to the CARLI PrimoVE Task Force for investigation.

Both goals require further assessment and detailed implementation strategies. It was the subcommittee's recommendation that the work be continued by an advisory group.

Our recommendation

The decisions surrounding this work should not be a decision of the Technical Services Committee alone. We feel it is possible for this work to be initiated by a committee made up of catalogers or technical services library staff, but the work should be informed by the wider consortia community through surveys or other types of qualitative and quantitative data gathering methods. Alternatively, two committees (one focused on the technical side and one focused on the reparative side) could collaborate on the work.

There is also the option of forming a committee with a charge of providing guidance on implementing procedures for reparative cataloging workflows at the individual library level (e.g., reclassification of print materials assigned with call numbers containing the .N Cutter number).

The challenges surrounding reparative cataloging work go beyond our controlled vocabularies and classification systems. Catalogers are often asked to approach cataloging as a one and done process that prioritizes quickness and efficiency. We need to change the culture of cataloging and recognize the implications for our users when libraries operate in this manner. With CARLI's guidance and leadership, catalogers can begin the process of this especially important work.