



California
Community
Colleges

Library Services
Platform

Governance Committee Meeting

Meeting Link:

<https://miracosta-edu.zoom.us/j/3354308671>

Password: library

or by Telephone: (669) 900 6833, Meeting ID: 335 430 8671

Password: 8927943

February 5, 2021

10 AM to 1 PM

Agenda

10:00 am	Welcome and Introductions - Michelle Ohnstad/Jeff Karlsen
10:10	REPORTS and updates <ul style="list-style-type: none">• Approval of minutes, October 2 Governance Meeting (5 min)• Consortium Update - Amy Beadle (10 min)• NZ and Program Manager positions - Amy Beadle (5 min)• Funding Update - Gregg Atkins (10 min)
10:40	NEW BUSINESS <ul style="list-style-type: none">• Co-chair election - Jeff Karlsen (10 min)• Named Users/Bib Records - Amy Beadle, Jeff Karlsen (30 min)
11:20	Break
11:30	NEW BUSINESS (cont) <ul style="list-style-type: none">• Contract and Individual Participation Agreements - Amy Beadle (20 min)• CCL/League - MOU regarding Governance Committee - Amy

	<p>Beadle, Gregg Atkins (15 min)</p> <ul style="list-style-type: none"> ● ELUNA NERS Process - Eve Miller/Lauren Saslow (15 min)
12:20	<p>WORK GROUP REPORTS AND POLICY RECOMMENDATIONS</p> <ul style="list-style-type: none"> ● Acquisitions/ERM - Norman Buchwald ● Analytics - Katrina Rahn ● Cataloging - Cheryl Cruse ● Circulation - Lori Lisowksi ● Discovery and User Experience - Lauren McFall ● Instruction - Karen Tercho
1:00	<p>ADJOURN</p>
<p>Next Meetings:</p>	<p>March 5, 2021, 10:00 am - 1:00 pm (Webinar)</p> <p>April 2, 2021, 10:00 am - 1:00 pm (Webinar)</p> <p>May 7, 2021, 10:00 am - 1:00 pm (Webinar)</p> <p>June 4, 2021, 10:00 am - 1:00 pm (Webinar)</p>

LSP Governance Committee Meeting - DRAFT

December 4, 2020

Attendees: Jeff Karlsen (co-chair), Michelle Ohnstad (co-chair), Gregg Atkins, Amy Beadle, Megan Kinney, Amy Brinkley, Karen Tercho, Evelyn Lord, Doug Achterman (past chair), Monika Chavez, Ward Smith (NZ task force), Cheryl Cruse, Katrina Rahn, Mary Wahl (NZ task force), Stephanie Roach (NZ task force), Jennifer Coleman (Tech Center), Lori Lisowski, Lauren Saslow, Rupa Saran (CISOA - IT), Dan Crump, Norman Buchwald, Eve Miller, Lauren McFall, John Taylor, Donna Reed, Brian Noone (Ex Libris for Matt Baker), Leslie Tiparelle, Eve Miller

REPORTS and updates

Approval of minutes, October 2 Governance Meeting - approved by acclamation

Consortium Update - Amy Beadle

- Finishing up calendar year renewals
- Working on transition to consortium manager
- Working on internal workflow issues
- Discussing new products with vendors
- Sending updated agreements to colleges in January
- Working to absorb LSP program - still in negotiations with Ex Libris - deadline is December 31, 2020
- Continuing to advocate for ongoing funding for the LSP
- Supporting Wednesday webinars and hiring LSP staff

NZ and Program Manager positions - Amy Beadle

- The announcements should go out by next week
- Will hire NZ manager by late January

Funding Update - Gregg Atkins

- There is a 4,000,000 request for ongoing funding for the LSP program
- Will know more in the January budget reveal
- There is a large advocacy group

Support/SalesForce cases update - Jeff Karlsen (sample issues from monthly meetings with Ex Libris)

- Discussed items that have performance issues when being requested
- Some libraries were using a new order input profile
- Working on getting someone from the ExL content group because there are a lot of cases related to content linking issues - still waiting for resolution on a number of issues
 - Action: Brian will work with Jeff to expedite this next week
 - Action/suggestion: check to see if there are any knowledge articles on the issues

Network Zone Administration - Jeff Karlsen (reporting for Israel)

- There is a NZ taskforce which is implementing the system by which OCLC refreshes our records on the daily load. There is currently a fair amount of work due to the number of libraries coming on.
- Working to ensure that the holdings are set properly.

- This work is happening post-reclamation.
- Action: if you are having issues with OCLC, let Israel know.

WORK GROUP REPORTS AND POLICY RECOMMENDATIONS

Acquisitions/ERM - Norman Buchwald

- Creating a Wednesday webinar - focusing on acquisitions module
- Beginning to plan first office hour which will take place in February and will focus on ERM issues
- The CDI issue is still a moving target
 - Challenge is that there are not a lot of policies to use as a guide
 - Have started a matrix with the pros and cons networking
 - Still working on identifying issues, will need to work with the new manager
- Starting to look at the policies - they are available and viewable in draft form
- Next meeting January 28

Analytics - Katrina Rahn

- Proposal to alter the charge so that it captures the training and educational aspect (teaching people to fish)
- Included current and proposed charge
 - Vote: approved the proposed change
- Had a webinar in October
- Launched office hours and had good experiences within the group - anticipating continuing office hours
- The Analytics freeze happened, now in a new, improved platform. You can now set permissions at the report level.
- Now have powerful data visualization and can bring in data from the outside
- Vote: in the future the practice will be that when workgroups reconvene, review the charges and record them.
 - Unanimously passed.

Cataloging - Cheryl Cruse

- Moving full speed ahead, lots of questions
- First Wednesday webinar
- Have had two office hours so far - both office hours had a fall presentation
- Mentioned work to change offensive subject headings (example: illegal aliens to undocumented immigrants)
 - There are some LCSH that are not going to be renewed.
 - The group is going to be changing the display in the network zone.
 - Recommendation: continue with the research and bring a specific proposal to the Governance Committee
 - Action: Ask the committee to come up with a general policy about updating subject headings for any reason for future situations - Bring back to the Feb. meeting
- Policy proposal: Have Network Zone group report to Cataloging group rather than the LSP workgroup

- Note - Israel is recommending this as well because it is a more natural fit.
- Comments
 - We may want to look at this once the manager is in place
 - This is a good direction, but we are not in a place to decide at this time - may be premature to decide what the relationship is
 - The NZ taskforce will be helpful in supporting the new manager and in bridging the gap
- Action: Bring this back to a subsequent meeting spring semester

Break

Circulation - Lori Lisowski

- Regularly meeting - engaged group
- Had Wednesday webinar in mid-November - got good feedback
- Have had office hours at different times of the day
- Have added a LibGuide to the wiki and are using a google sheet
- Have a workgroup working on issues around scanning - for spring
- Working on letters and notices
- Looking at complexities of lost items
- Thinking about making FAQs

Discovery and User Experience - Lauren McFall / Amy Brinkley

- Slower pace this semester - partly because of overwhelm due to current COVID theory
- Looking at NERS reviews so we can coordinate the voting process
- Going to do user testing in spring again - this will be a version 2
- Have been hosting office hours that have been popular
- Action: work with Analytics to see if students actually use subject headings

Instruction - Karen Tercho

- Held Wednesday webinar
- Adopted a formal charge - is on the wiki now
- Developed a shared resources folder
- Have discovered that there are a lot of different experiences in teaching - trying to find how to meet diverse needs
- Will have office hours/sharing session in the spring maybe 2x per month
- Will collaborate with the UX group - to solve problems related to instruction

NEW BUSINESS

Electronic resource sharing - Lauren Saslow

- This is a temporary workgroup--subgroup of Circulation--to look into electronic resource sharing
- The investigation has begun - have had a consultation with SUNY and like their setup
- Would like to pilot this with a small group - would need to determine who would be the lending libraries
- Need to wait for the NZ manager

- We thought this would be good to go forth as a small pilot - Let Lauren know if your library is interested

Communication/website content management tool recommendation -- Amy Beadle

- Need to move the documentation from the Tech Center.
- Looked at multiple products
 - Confluence
 - Drupal
 - LibGuides
- Vote: Move that we adopt LibGuide with LibAnswers - unanimous
- ELUNA NERS Process - Eve Miller/Lauren Saslow - moved to next meeting or by email
- Wednesday Webinars & Office Hours - Michelle Ohnstad
 - Attendance has been robust.

Next Meetings:

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Named Users Recommendation

Background

A “named user” is an Alma user account with an active user role other than Patron, Instructor, or Trial Participant.

The original contract that the CCC Technology Center signed with Ex Libris, which expired December 31, 2020, included a table allocating a specific number of named users to each college.

The current LSP contract provides for **1437** named users throughout the consortium. The consortium has been given a window, ending March 31, 2021, to bring the total number down to this limit. The consortium may then purchase additional named users at a cost of \$375/year.

Each institution has 2 users designated for use by Ex Libris, namely exl_impl and exl_api. These users do not count toward the limit.

The Governance Committee is being asked to allocate named users per institution. A task force consisting of Eve Miller (Santa Rosa), Katrina Rahn (CCSF), Monika Chavez (Mt. San Antonio), Jude Baldwin (Siskiyou) and Jeff Karlsen (Sacramento City) were charged with presenting a recommendation to the Governance Committee.

Note: members of the LSP Task Force have expressed concern to Ex Libris that a need to limit the number of named users was not addressed during training.

Recommendation

Please see the file Named Users Proposed Allocation.pdf for the proposed college-level allocations. Three columns show different calculations. The column showing FTES-only is included for reference purposes only. **The task force is asking the Governance Committee to decide between two formulas:**

1. Base allocation + per-FTES
2. Smaller base allocation + 1.5 users per circ desk (max 5 users from this pot) + per-FTES

Rationale

Several factors were discussed as relevant to allocating users per college.

FTES

The task force agreed that FTES is an important metric for the following reasons:

- College-level pricing has been set according to FTES; therefore it seems fair to allocate a commodity such as named users accordingly.
- Number of students will be correlated somewhat to library use, and therefore staff needs; larger colleges will tend to have more total circulation activity, longer library hours, and larger collections, and therefore more staff.

Base allocation

Even the smallest libraries will have a need for a certain number of named users. Alma/Primo VE requires configuration and maintenance; circulation activity needs to be managed and performed; the Alma repository needs to be worked on.

The task force found that if FTES alone were used to allocate named users, low-FTES libraries in our consortium would be allotted as few as 2 named users. Therefore it was agreed that each library would receive a base number of named users, with additional named users added for multiples of a particular number of FTES.

Circ Desks / Service desks

Many colleges have traditionally offered circulation services at multiple locations which do not share staff. Generic staff logins are not practical to use simultaneously in different Alma libraries or circulation desks. The task force struggled with the question of whether or not the number of circulation desks with separate staffing needs at a given college should increase the college-level named user allocation. No consensus was reached and the Governance Committee is being presented with two options, one of which takes this metric into account.

Please note that the number of circulation desks shown in the table is estimated, based on circulation desks in Alma that show circulation transactions. If the Governance Committee decides to use this metric, outreach may be required to determine the true number of service desks requiring separate staff.

Network Zone administration

Named users in the Network Zone institution (01CACCL_NETWORK) count toward the 1437 limit. However, these users should be purchased in excess of the limit allocated to the colleges, using the funds the colleges have paid for consortial administration. It is estimated that the NZ will require 5-8 named users.

Multi-college Alma institutions

36 of our colleges share an Alma institution with at least one other college. Each college will receive a separate allocation. However, an institution's users can only be monitored by Ex Libris and the consortium at the institution level. Therefore these colleges will need to coordinate their named user setup internally.

Acquisition of additional users

Institutions that exceed their allocation will be invoiced by the League after July 1, 2021.

Reallocation of spare users

Some institutions will need more users than they are allocated. Others may be allocated more than they need. The task force recommends that the following process be used.

By March 15, 2021, each institution will inform a consortium contact of the number of named users they will be using. Institutions that declare a number lower than their allocation will be committing not to exceed that number.

Institutions will be invoiced after July 1, 2021, for the number of named users in excess of their allocation. The price of each user will be discounted according to the number of surplus named users unused by institutions.

Example

15 institutions declare that they will be under their allocation. The total number of surplus users across these institutions is 20.

The saved value is $20 \times 375 = 7,500$

10 institutions say they need extra users. The total number needed is 30.

The undiscounted price is $30 \times 375 = 11,250$

Total cost of these users is reduced by the unused cost of surplus users:

$11,250 - 7,500 = 3,750$

Cost of each of the 30 users is then $3,750 / 30 = \$125$ per user.

Process for periodic reallocation

The Governance Committee will need to determine the process for reallocating named users over time.

Strategies for reducing users

Institutions will need to take a number of steps, including:

- Use shared accounts for certain roles, e.g. student circulation desk operators
- Remove the admin account created by Ex Libris at the time of migration (aadmin)
- Remove Alma staff roles from librarians or other personnel who do not regularly need access to Alma. Note: People who require only short-term, intermittent access to the system may have their roles normally be inactive, and then activated for short periods, and will not count toward the limit.

Alma Institution Code	College	FTES (number used for pricing)	Number of Circ Desks (est.)	No base allocation; FTES / 343 - for reference only	Base allocation of 5 + FTES / 555	Base allocation of 3 + 1.5 users per circ desk up to 5 total + FTES / 609
01CACCL_AHC	Allan Hancock College	4,530	3	13	13	15
01CACCL_ANTELOPE	Antelope Valley College	4,987	2	15	14	14
01CACCL_ANTONIO	Mt. San Antonio College	13,301	6	39	29	30
01CACCL_BAKERS	Bakersfield College	8,574	2	25	20	20
01CACCL_BARSTOW	Barstow College	1,156	1	3	7	6
01CACCL_BERNARDINO	San Bernardino Valley College	5,177	1	15	14	13
01CACCL_BUTTE	Butte College	4,489	4	13	13	15
01CACCL_CABRILLO	Cabrillo College	4,219	6	12	13	15
01CACCL_CANYONS	College of the Canyons	6,416	3	19	17	18
01CACCL_CCSF	City College of San Francisco	6,943	12	20	18	19
01CACCL_CERRITOS	Cerritos College	8,182	1	24	20	18
01CACCL_CERRO	Cerro Coso Community College	1,502	2	4	8	8
01CACCL_CHABOT	Chabot Community College	4,318	3	13	13	15
01CACCL_CHAFFEY	Chaffey College Library	7,762	3	23	19	20
01CACCL_CITRUS	Citrus College	5,145	1	15	14	13
01CACCL_COAST	Coastline College	2,723	0	8	10	7
01CACCL_COLUMBIA	Columbia College	814	1	2	6	6
01CACCL_COMPTON	Compton College	1,992	1	6	9	8
01CACCL_CONTRA	Contra Costa College	2,463	1	7	9	9
01CACCL_COPPER	Copper Mountain College	600	2	2	6	7
01CACCL_CRAFTON	Crafton Hills College	2,228	1	7	9	8
01CACCL_CUESTA	Cuesta College	3,939	2	11	12	12
01CACCL_CUYAMACA	Cuyamaca College	2,236	1	7	9	8
01CACCL_CYPRC	Cypress College	5,867	1	17	16	14
01CACCL_DEANZA	De Anza College	5,078	1	15	14	13
01CACCL_DESERT	College of the Desert	5,498	3	16	15	17
01CACCL_DIABLO	Diablo Valley College	7,861	2	23	19	19
01CACCL_ELCAMINO	El Camino College	8,425	4	25	20	22
01CACCL_FC	Foothill College	3,587	1	10	11	10
01CACCL_FEATHER	Feather River College	836	1	2	7	6
01CACCL_FULLERTN	Fullerton College	8,359	1	24	20	18
01CACCL_GAVILAN	Gavilan College	2,511	1	7	10	9
01CACCL_GLENDALE	Glendale Community College	5,740	3	17	15	17
01CACCL_GOLDEN	Golden West College	5,104	1	15	14	13
01CACCL_GROSSMONT	Grossmont College	5,099	1	15	14	13
01CACCL_HARTNELL	Hartnell College	3,700	2	11	12	12

Alma Institution Code	College	FTES (number used for pricing)	Number of Circ Desks (est.)	No base allocation; FTES / 343 - for reference only	Base allocation of 5 + FTES / 555	Base allocation of 3 + 1.5 users per circ desk up to 5 total + FTES / 609
01CACCL IMPERIAL	Imperial Valley College	3,648	1	11	12	10
01CACCL_JACINTO	Mt. San Jacinto College	5,224	2	15	14	15
01CACCL_LACCD	East Los Angeles College (ELAC)	9,503	2	28	22	22
	Los Angeles City College (LACC)	4,375	1	13	13	12
	Los Angeles Harbor College (LAHC)	2,649	1	8	10	9
	Los Angeles Mission College (LAMC)	2,852	1	8	10	9
	Los Angeles Pierce College (LAPC)	5,958	1	17	16	14
	Los Angeles Southwest College (LASC)	1,842	1	5	8	8
	Los Angeles Trade- Technical College (LATTC)	4,375	1	13	13	12
	Los Angeles Valley College (LAVC)	4,998	1	15	14	13
	West Los Angeles College (WLAC)	2,868	1	8	10	9
	01CACCL_LASSEN	Lassen Community College	739	5	2	6
01CACCL_LBCC	Long Beach City College	9,082	2	27	21	21
01CACCL_LRCCD	American River College (ARC)	10,907	2	32	25	24
	Cosumnes River College (CRC)	4,749	2	14	14	14
	Folsom Lake College (FLC)	3,011	3	9	10	12
	Sacramento City College (SCC)	6,662	7	19	17	19
01CACCL_MEDANOS	Los Medanos College	3,714	2	11	12	12
01CACCL_MENDOCINO	Mendocino College	1,320	3	4	7	10
01CACCL_MERCED	Merced College	4,630	2	14	13	14
01CACCL_MIRACOSTA	MiraCosta College	4,807	12	14	14	16
01CACCL_MISSION	Mission College	2,455	1	7	9	9
01CACCL_MODESTO	Modesto Junior College	5,878	2	17	16	16
01CACCL_MONTEREY	Monterey Peninsula College	2,720	2	8	10	10
01CACCL_MOORPARK	Moorpark College	5,459	1	16	15	13
01CACCL_OC	Oxnard College	2,460	1	7	9	9
01CACCL_OHLONE	Ohlone College	3,757	2	11	12	12

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01CACCL_ORANGE	Orange Coast College	8,647	2	25	21	20
01CACCL_PALOMAR	Palomar College	8,446	4	25	20	22
01CACCL_PALOVERDE	Palo Verde College	912	1	3	7	6
01CACCL_PCC	Pasadena City College Library	10,757	3	31	24	25
01CACCL_PCCD	Berkeley City College (BCC)	1,706	1	5	8	7
	College of Alameda (COA)	1,489	1	4	8	7
	Laney College (LAN)	3,224	4	9	11	13
	Merritt College (MER)	2,161	1	6	9	8
01CACCL_PORTER	Porterville College	1,641	1	5	8	7
01CACCL_POSITAS	Las Positas College	3,138	1	9	11	10
01CACCL_RCCD	Moreno Valley College (MVC)	3,383	1	10	11	10
	Norco College (NOR)	3,541	1	10	11	10
	Riverside City College (RIV)	7,620	1	22	19	17
01CACCL_REDWOODS	College of the Redwoods	2,065	2	6	9	9
01CACCL_RIOHONDO	Rio Hondo College	6,149	1	18	16	15
01CACCL_SANA	Santa Ana College	9,606	2	28	22	22
01CACCL_SANJOAQUIN	San Joaquin Delta College	6,600	2	19	17	17
01CACCL_SANTIAGO	Santiago Canyon College	4,768	1	14	14	12
01CACCL_SBARBARA	Santa Barbara City College	6,286	4	18	16	18
01CACCL_SC	Shasta College	3,362	3	10	11	13
01CACCL_SCCCD	Clovis Community College (Clovis)	2,761	1	8	10	9
	Fresno City College (Fresno)	8,874	4	26	21	23
	Madera Community College Library (Madera)	1,260	1	4	7	7
	Reedley College (Reedley)	2,608	3	8	10	12
01CACCL_SDCCD	San Diego City College (ci)	4,913	1	14	14	13
	San Diego Mesa College (ms)	7,336	1	21	18	17
	San Diego Miramar College (mm)	4,411	1	13	13	12
01CACCL_SEQUOIAS	College of the Sequoias	5,188	6	15	14	17
01CACCL_SIERRA	Sierra College	6,842	3	20	17	19
01CACCL_SISKIYOU	College of the Siskiyous	958	1	3	7	6

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01CACCL_SJECCD	Evergreen Valley College (EVCCAMPUS)	3,193	1	9	11	10
	San Jose City College (SJCCCAMPUS)	2,671	1	8	10	9
01CACCL_SMCCD	Cañada College (CAN)	1,834	1	5	8	8
	College of San Mateo (CSM)	3,226	2	9	11	11
	Skyline College (SKY)	3,846	2	11	12	12
01CACCL_SMONICA	Santa Monica College	10,287	2	30	24	23
01CACCL_SRJC	Santa Rosa Junior College	7,920	4	23	19	21
01CACCL_SWESTERN	Southwestern College	6,977	4	20	18	19
01CACCL_TAFT	Taft College	1,268	1	4	7	7
01CACCL_TAHOE	Lake Tahoe Community College	529	3	2	6	8
01CACCL_VC	Ventura College	4,677	2	14	13	14
01CACCL_VICTORVALLEY	Victor Valley College	4,449	1	13	13	12
01CACCL_WESTVALLEY	West Valley	2,868	1	8	10	9
01CACCL_WHCCD	West Hills College Coalinga (CLG)	1,038	2	3	7	8
	West Hills College Lemoore (LMR)	1,483	1	4	8	7
01CACCL_YUBACCD	Woodland Community College (Woodland, Clear Lake, Colusa)	1,164	2	3	7	8
	Yuba College (Marysville and Sutter)	2,267	3	7	9	11
				1437	1,437	1437

Library Services Platform Work Group Report Out to Governance Committee

SUBJECT: Monthly Report		Date: 2/2
		Attachment:
DESIRED OUTCOME:		Urgent:
		Time Requested:
WORK GROUP:	ERM/Acquisition Workgroup	TYPE OF GOVERNANCE COMMITTEE
REPORTED BY:	Norman Buchwald, Lead	Information
		Discussion
		Action

ISSUE/SUMMARY: *Example- “Report out on Circulation Work Group activities”*

The workgroup has met two times. We are planning to have our first Office Hour in early March, we had our first Wednesday session on acquisitions basics in December to much success, we are currently working on the document addressing state-wide databases and shared collections and pluses and minuses to have them on the Network Zone, and twenty minutes before our last meeting we have been asked to address in some way the required cap on bibliographic records and how to remove portfolios and other records that may be sitting there or be duplicates. After I learn more at the next governance board meeting, I will notify the workgroup what we should be planning regarding the newest request. We have decided to table further work on all current Policies, Best Practices, and Recommendations on our website until the Network Zone Manager is hired and provides us feedback.

BACKGROUND/REPORT:

RECOMMENDED ACTION: The workgroup needs more information/specifics as to what the vendor is asking regarding the cap of bibliographic records and what/how we are over and what can realistically be done by a March 31st deadline. With the Network Zone manager position not yet filled, one solution which can include NetLibrary shared collections and statewide databases being only on the network zone—that cannot be accomplished until we have a regular network zone manager who can manage all of this.

Library Services Platform Work Group Report Out to Governance Committee

SUBJECT: Activities of the Cataloging Workgroup		Date: Feb. 5, 2021 Year:	
DESIRED OUTCOME:	First Review Proposal for Change of LCSH Terminology for Undocumented Immigrants in NZ	Urgent:	
		Time Requested:	
WORK GROUP:	Cataloging	TYPE OF GOVERNANCE COMMITTEE CONSIDERATION:	
REPORTED BY:	Cheryl Cruse	Information	X
		Discussion	X
		Action	

ISSUE/SUMMARY: Example- “Report out on Circulation Work Group activities”

Report of the Cataloging Workgroup Activities

BACKGROUND/REPORT:

1. Cataloging Office Hours offered to LSP members – 4 have been hosted
2. Cataloging Problem Form for LSP members
 - o Workgroup has created a Google form for LSP Members with questions
3. Presentation of the workgroup’s Proposal for how to implement a change of LCSH terminology “Illegal Aliens” for “Undocumented Immigrants” in the Network Zone. First Review for Governance Comm.

RECOMMENDED ACTION:

Request a First Review of Cataloging Workgroup’s *Proposal for Change of LCSH Terminology for Undocumented Immigrants in NZ*. The Cataloging Workgroup has drafted two of the most desirable options to address the issue of racist LCSH terms in OCLC records. Included are the benefits and drawbacks to each option.

It is hoped that in future Governance Committee meeting, possibly after NZ Manager is hired, an extensive review of the Proposal will allow for a selection by the Governance Committee of the best option for the LSP to be selected.

Proposal to LSP Governance Committee

Submitted by: Cataloging Work Group

Date: February 5, 2021

Topic: Change display of racist LCSH terms related to undocumented immigrants in NZ

Summary of problem:

Library of Congress Subject Headings include terms related to noncitizens and undocumented immigrants that are pejorative and offensive to many users of OneSearch. This problem has been well documented and discussed among librarians since 2016 when proposed changes to the terminology by the Library of Congress were rejected by Congress, and unable to be implemented. Since then, the American Library Association's Subject Analysis Committee has recommended specific changes to the terminology ([Report 2016, Attachment 6](#)) and that libraries should make changes locally, rather than wait on the Library of Congress to act ([Report 2020, p 8](#)).

Non-preferred terminology appears in several places in OneSearch, including topic facets and full record view details for subjects (see appendix, figure 1). Changes within our consortium are possible as follows:

- Network Zone linked bibliographic records can be changed centrally to use preferred terminology
- Local college or district Alma institutions can change
 - Subject display settings to transform or hide non-preferred terminology in full record display
 - Subjects in institution zone bibliographic records (any not linked to the NZ)

Changes cannot be made by our consortium or college/district institutions to portfolio records from electronic collections that are part of the Community Zone. Offensive terminology will still be visible in OneSearch depending on the source of the record. Although vendor records are increasingly being changed to use preferred vocabulary, it is not consistent. Advocating for change by vendors could be a next step on this front.

This proposal presents the Cataloging Work Group's recommendation for solving the problem through changes to subject headings made centrally within the Network Zone and/or in combination with local college or district Alma institutions. The changes will only affect Alma bibliographic records. Non-preferred terminology appearing in non-subject heading fields will not be replaced (e.g., 245 title, 505 content notes, etc.).

Recommendation:

Implement one of the two options outlined below, according to the priorities of the LSP Governance Committee. Preferred terminology is outlined in Table 1 of the Appendix.

Two options stand out as best possible solutions to this problem for our consortium. One solution, favored by most members of the Cataloging Work Group, prioritizes the user experience by removing offensive terminology from subjects and browseable topics altogether. The other, preferred by a minority of Cataloging Work Group members, prioritizes flexibility and catalog record integrity, by allowing college/district Alma institutions to make local decisions about how terminology will display. Additional pros and cons will be briefly outlined below.

See “Appendix, Section 2” for additional details about these and other options the Cataloging Work Group considered for this project.

Option: Prioritize the User Experience

How it works: Network Zone replaces non-preferred terminology found in MARC 6XX for all bibliographic records linked to the NZ. Essentially, non-preferred terminology is updated through a “find and replace” type function.

Pros:

- User experience is optimized--Non-preferred terminology will no longer appear¹ in display of record subjects or topic facets
- This option is the least burdensome to the LSP librarians. A centrally managed solution, means the work is completed at the NZ level. Individual colleges/districts need not make additional changes to NZ linked bibliographic records

Cons:

- Subject searches will no longer retrieve results for the non-preferred terminology, though keyword searches will. Subject authority records would not be updated to help provide “see” or “see also” results
- Network Zone linked records will no longer match OCLC master records or terminology found in subject authority files

¹ Caveat: Local Institution Zone bibliographic records and Community Zone portfolio records from electronic collections may still include non-preferred terminology

- Batch cleanup work *may* be required when/if Library of Congress moves forward with universally updating this terminology

Option: Prioritize Flexibility

How it works: Network Zone inserts preferred terminology in MARC 69X for all NZ linked bibliographic AND colleges/districts make local subject display changes in their Alma institution. Essentially, preferred terminology is added to all impacted records, and local institutions may choose to hide or uniquely transform non-preferred terminology.

Pros:

- Non-preferred terminology is not displayed in full record details *only when subject display rules hide or transform it*
- Preferred *and non-preferred* terminology is always displayed in browseable topics/subject facets
- Colleges / districts prioritize how and which terminology to display locally
- Catalog record integrity is maintained by matching Alma bibliographic records to OCLC master record, and subject authority records
- Non-preferred terminology that aligns with legal definitions is indexed
- No batch record cleanup required when/if Library of Congress updates subject headings universally

Cons:

- Non-preferred terminology is always displayed in full record details *when no local subject display rules are put in place to hide or transform it*
- Non-preferred terminology is always displayed in browseable topics/subject facets
- Local changes are more flexible with this option but may be burdensome for institutions, which must independently do work to implement changes
- Appearance and display of terminology will be inconsistent across the consortium, which may have a negative impact on OneSearch users who use search at more than one college/institution. This may have implications when resource sharing between the colleges is expanded through interlibrary loan.

Appendix

Section 1. Figures and Tables

Figure 1. Screenshots of non-preferred terminology as it appears in OneSearch

Details

Title The Ethics of Immigration

Creator Carens, Joseph H., author. >

Subject

- [Illegal aliens -- Government policy -- United States >](#)
- [Emigration and immigration -- Government policy >](#)
- [Emigration and immigration -- Moral and ethical aspects >](#)
- [Illegal aliens -- Government policy >](#)
- [Society >](#)
- [United States -- Emigration and immigration -- Government policy >](#)
- [United States >](#)

Cañada College OneSearch, full record display “Details” includes non-preferred terminology

Refine my results

Sort by Relevance ▾

Subject ^

- United States (8)
- Case Studies (2)
- Children Of Illegal Aliens Education Law And Legislation (2)**
- Children Of Illegal Aliens Education Law And Legislation United States (2)**
- Emigration And Immigration (2)
- Emigration And Immigration Government Policy (2)
- Emigration And Immigration Social Aspects (2)
- Rechtsstellung (2)
- Social Science Emigration Immigration (2)
- Undocumented Immigrants (2)
- United States Emigration And Immigration Social Aspects (2)

0 selected 10 Results

- 2017
Available at Skyline College Library Circulating Collection (JV6600 .L85 2017) >
- BOOK
Lost children archive : a novel
Luiselli, Valeria, 1983- author.
2019
Available at Skyline College Library New Fiction (PQ7298.422.U37 L67 2019) >
- BOOK
Whose child am I? : unaccompanied, undocumented children in U.S. immigration custody
Terrio, Susan J. (Susan Jane), 1950- author.
2015
Available at Cañada College Library Stacks (JV6600.T47 2015) and other locations >
Available Online >
- BOOK
Dreamers : an immigrant generation's fight for their American dream
Truax, Eileen, author.
2015
Available at Cañada College Library Stacks (JV6483.T78 2015) and other locations >

Cañada College OneSearch, search results subject or topic facet includes non-preferred terminology

Table 1. Subject Headings to Change

The table lists the proposed changes to Library of Congress Subject Headings, and corresponds to alternate subject headings proposed by ALA’s Subject Analysis Committee.

“Illegal aliens” and derivatives are replaced with “Undocumented immigrants.” “Aliens” and derivatives are typically replaced with “Noncitizens.” However, some variations apply.

LCSH	Preferred Terminology
Alien criminals	Noncitizen criminals
Alien detention centers	Immigrant detention centers
Alien property	Foreign-owned property
Aliens	Noncitizens
Aliens in art	Noncitizens in art
Aliens in literature	Noncitizens in literature
Aliens in mass media	Noncitizens in mass media
Aliens in motion pictures	Noncitizens in motion pictures
Relations with aliens	Relations with noncitizens
Taxation of aliens	Taxation of noncitizens
Church work with aliens	Church work with noncitizens
Deportation of aliens	Deportation of noncitizens
Illegal alien children	Undocumented immigrant children
Illegal aliens	Undocumented immigrants
Illegal aliens in literature	Undocumented immigrants in literature
Children of illegal aliens	Children of undocumented immigrants
Women illegal aliens	Women undocumented immigrants

Table notes: Terminology in **bold** is specifically named in [SAC Working Group’s proposed revisions to LCSH](#). Changes to derivatives can be inferred, and aligns with what other institutions, including CSUs are doing. The change from “Alien property” to “Foreign-owned property” is from changes implemented at SUNY.

Section 2. Cataloging Work Group considerations and options

The Cataloging Workgroup referred to the [resolution adopted by the American Library Association](#) and the [SAC Working Group document on Alternatives to LCSH “Illegal Aliens”](#) to replace the term “Illegal aliens” with “Undocumented immigrants.”

The goal is to have the strongest impact on the user experience. If and when the Library of Congress makes universal changes, the Cataloging Work Group and representative NZ Task Force members who participated in the discussion believe that the additional technical work needed to clean up edited records would be worth the effort. For institutions to benefit from these changes, IZ records with OCLC numbers need to be linked to the NZ.

The NZ Administrator, when hired, could perform maintenance updates via a regularly scheduled job.

Four options considered by Cataloging Work Group (in no particular order)

Option 1: Network Zone MARC 69X & local subject display changes

Network Zone adds preferred terminology to NZ shared records: 1) Runs job to update existing MARC records in 69X, and 2) creates an import profile to handle adding preferred terminology in the local subject fields (69X) as new records are added or updated from OCLC. Additionally, institutions are strongly encouraged to add a local subject display rule to transform and hide non-preferred terminology, and to run jobs and add rules to make changes to any IZ records (not linked to NZ).

Result: Non-preferred terminology is not displayed, integrity is maintained in matching Alma bibliographic records to OCLC master record, and OneSearch functions properly, including indexing and facets for preferred terminology.

Caveat: Facets or topics area in Primo may display both preferred and non-preferred terminology. Local changes are more flexible with this option but may be burdensome for institutions. This leaves legally-mandated terms in place in the records. Allows institutions to select how they would like to address the issue.

Option 2: Network Zone MARC 69X only

Network Zone adds preferred terminology to NZ shared records: 1) Runs job to update existing MARC records in 69X, and 2) creates an import profile to handle adding preferred terminology in the local subject fields (69X) as new records are added or updated from OCLC.

Result: Displays of both preferred and non-preferred terminology. Integrity is maintained in matching Alma bibliographic records to OCLC master record. Local colleges (institutions) still have the option to implement display changes independently.

Option 3: Network Zone MARC 6XX only

Network Zone adds preferred terminology to NZ shared records by overwriting non-preferred terminology. 1) Network Zone runs job to update existing records, and creates an import profile to handle adding preferred terminology in the LC subject fields (6XX).

Result: Displays of only preferred terminology, results in loss of integrity in matching Alma bibliographic records to OCLC master records. Indexing and facets in OneSearch work properly, and do not display non-preferred terminology. Requires no changes at institution level. Cleanup of these altered records would be necessary if OCLC adopts the changes to its records. This option is the least burdensome to the LSP librarians. The work is completed at NZ level only. This option supports our LSP institution members. Keyword searches would only retrieve the non-preferred terms but subject searches would not retrieve results. Subject authorities would not be updated.

Option 4: Local changes only

Institutions add a local subject display rule to transform and hide non-preferred terminology in full record display details. This option is currently available to institutions. Indexing on preferred terminology does not occur, and non-preferred terminology still appears in topic facets.

Library Services Platform Work Group Report Out to Governance Committee

SUBJECT: Circulation Work Group Activities		Date: 2/1/2021	
		Attachment:	
DESIRED OUTCOME:	Information Sharing	Urgent:	
		Time Requested: 10 min.	
WORK GROUP:	Circulation	TYPE OF GOVERNANCE COMMITTEE	
REPORTED BY:	Lori Lisowski	Information	x
		Discussion	x
		Action	

ISSUE/SUMMARY: Report out on Circulation Work Group activities

BACKGROUND/REPORT:

- Membership: Lynda Letona, an access services librarian from Diablo Valley College, joined the group in December.
- Office hours: We hosted four circulation office hours in December. Although not widely attended, the feedback we received encouraged us to continue them this spring. They are the first Wednesday of the month at 1:00 p.m. and the third Wednesday at 4:00 p.m.
- Wednesday webinar: Two members have been developing a webinar on letters and notices that will be shared later this spring. To make such a large topic more manageable we look at the process through the lens of one of the more complex notices-- the Overdue and Lost Loan Notification Letter. This is arguably the trickiest to set up because it is five letters within a single notification. The webinar will walk users through the whole process to set up this letter, how the notification is triggered, how labels work, and how to modify them.
- Sub-group projects:
 - *Scanning and digitization*--workflow, technical challenges and copyright issues for scanning items to provide more access to students. This is a hot topic in our office hours and elsewhere, but the legal aspects make this quite sensitive. We are in the information gathering phase and have a resource document on our wiki page.
 - *Lost and damaged items*--the overlapping issues of lost items, billing, damaged items and SIS blocks. As a start, a Quick Tip for enabling the close_paid_lost_loan parameter was posted on the wiki in January.
- Re-opening resources: A best practices document was begun last April but dropped when it became clear that libraries would remain closed for quite some time. Now that libraries are beginning to think about re-opening (or are re-opening on a limited basis), we are looking at what resources we can compile to help libraries work through re-opening from a circulation perspective. Because each library's situation is so different, we don't expect this to be a best practices document but rather more like considerations and examples to tailor to one's own needs.
- FAQs: We plan to piggy-back off of what the Cataloging Work Group has done by having an online form for people to submit questions and links to existing FAQ sites (Harvard, SUNY, etc.) that present information in user-friendly formats. We currently do not have enough bandwidth to take on creating our own FAQs.

Library Services Platform Work Group Report Out to Governance Committee

SUBJECT: Work Group Report		Date: 2/5/2021	
		Attachment:	
DESIRED OUTCOME:		Urgent:	
		Time Requested: 5 minutes	
WORK GROUP:	Discovery & UX	TYPE OF GOVERNANCE COMMITTEE	
REPORTED BY:	L. McFall, A. Brinkley	Information	X
		Discussion	
		Action	

ISSUE/SUMMARY: Discovery & UX Work Group plan for spring 2021

BACKGROUND/REPORT:

- Work group met to discuss spring 2021 priorities on Jan. 28, 2021 ([Minutes](#))
- February focus will be on providing support for discovery-related NERS submissions
- Work group will prioritize NERS for recommendation on CCC voting; will coordinate with other work group leads
- March and April will focus on collaboration with Analytics work group to explore Primo Analytics; joint Outlook article to be crafted for April issue (hopefully)

RECOMMENDED ACTION:

None.

Library Services Platform Work Group Report Out to Governance Committee

SUBJECT: Instruction Work Group		Date: 02/01/2021	
		Attachment:	
DESIRED OUTCOME:		Urgent:	
		Time Requested:	
WORK GROUP:	Instruction	TYPE OF GOVERNANCE COMMITTEE	
REPORTED BY:	Karen Tercho	Information	X
		Discussion	
		Action	

ISSUE/SUMMARY: Report out on Instruction Work Group activities

BACKGROUND/REPORT:

The Instruction Work Group met on Feb. 3. This semester we will hold monthly meetings on the first Wednesday. Following are the projects we will be working on this semester:

- 1) Wednesday Webinar (December 2020) - participant feedback was gathered.
 - a) Recap, classify, and review attendee comments.
 - b) Resulting projects
 - i) Expand shared resources: [LSP Instruction Work Group - Resources for Teaching PrimoVE](#)
 - ii) Work on sharing of Los Rios tutorials (currently in Commons) with supporting information
 - iii) Create short videos with scripts - e.g. how to find scholarly articles in OneSearch
 - iv) Create list of steps for video creation - e.g. Canvas Studio; Screencast-o-matic & YouTube; Playposit (video quizzes) etc.
 - v) LibWizard - collect links and figure out sharing
 - vi) Research how CSUs are providing instruction on Primo - compile list of the best (tutorials, videos, LibGuides, 1-sheets, etc.)

- 2) Currently determining plan for spring 2021 Instruction Work Group office hours – Primo Sharing Sessions - show up and share, or show up and learn.

RECOMMENDED ACTION: n/a