



# UMATILLA COUNTY SPECIAL LIBRARY DISTRICT

Strengthening our community libraries

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## Technical Services Manager Monthly Report

Date: March 19, 2026  
Staff Name: Dea Nowell  
Time Period Report Covers: February 2026

### Position Purpose Statement

The purpose of this position is to support the UCSLD member libraries' abilities to provide services and participate in consortia activities through cataloging (maintaining the integrity of the bibliographic database and authority control) and technical support. Additionally, this position also administratively & technologically supports the UCSLD Board of Directors and staff.

### Statistics

#### *cataloging statistics:*

<i>date</i>	<i>* Item additions to Sage</i>	<i>* Item deletions from Sage</i>	<i>* Item corrections in Sage</i>	<i>Temporary bibs upgraded</i>	<i>*** Sage bib fixes</i>	<i>*** Sage bib merges</i>	<i>*** Sage bib deletes</i>	<i>*** Sage bib overlays</i>
Feb. 2026	305	376	89	0	17	1	0	2

\* for the most part all libraries in District: except Hermiston, Milton-Freewater, Pendleton, Umatilla, & Weston [though I do add a few bibs for Umatilla, counted in here, but not items]

\*\*\* looking strictly at bibliographic records, not necessarily all are related to District libraries' holdings

#### *reports run:*

##### regular monthly:

- item creation stats: all 12 public libraries
- temp bibs missed being put into bucket
- OCLC CatExpress stats (added & deleted)
- circulation related: Adams PL - 3, Athena PL - 3, Milton-Freewater PL - 5, Pilot Rock PL - 1, Stanfield PL - 3
- pre-cataloged items: Milton-Freewater PL - 1, Ukiah P/SL - 1
- in process items: Milton-Freewater PL - 1

##### additional reports:

- none

### Meetings and Site Visits

- Sage Cataloging work group meeting [via Zoom]: 1 (2/3)
- Staff/Safety meeting [via Teams]: 1 (2/10)
- Sage Library Things discussion [via Zoom]: 1 (2/18)
- UCSLD Board meeting [via Zoom]: 1 (2/24)
- Sage Cataloging Mentor meeting [via Zoom]: 1 (2/25)
- meet weekly w/ Heather [via MS Teams]: 4 (2/2, 2/9, 2/17, 2/23)
- webinars/trainings attended [virtual]:
  - Vector Solutions: Supporting employee wellbeing for supervisors (2/5)
  - 1<sup>st</sup> half of OCLC Cataloging Community mtg.: Metadata Panel: Using AI ethically & effectively (2/11)
  - web.: What you need to know about AI [part of The Library 2.0 2026 "AI & Libraries" overview: where we are now] (2/17)
  - SACO [Subject Authority Cooperative Program] office hrs.: Given LC's recent announcement that it will discontinue the use of \$v subdivisions > presenting on LCGFT manual & LCGFT proposal process (2/26 viewed recording of 2/13 live presentation)
  - Sage Report work group (2/26 viewed recording of 2/24 presentation)

## visits to/with District Libraries:

### Adams PL - 2 [phone, email]

- called re. email ? about deleting a patron's old account > walked through the process & emailed link to documentation about using user buckets to purge patron records in bulk (2)

### Pilot Rock PL - 1 [phone]

- called re. info. for an item with no tag in scan

### Stanfield PL - 6 [phone, email]

- called re. email re. LoT & call #s, w/ the reasoning of giving name in call # to make easier for patrons & staff to ask for &/or identify
- calls to verify pages for an item, price for another item, & barcode of an item (3)
- called to check on pages for an item
- call rec'd checking to see if I'd rec'd some emails from her... not always sure going through...

### Ukiah PL - 2 [phone, email]

- called re. email ? about Reference weeding report > no Ref. listed in shelving locations... he was thinking NF > pointed out all the shelving locations w/ 10 yr.+ no circ in report sent 1/5 in tabs across bottom... he noted NF would be pretty much full section, so we talked about various approaches (esp. school related) & in-house use counts as a possibility going forward
- emailed documentation link re. in-house use counts

## Projects and Progress

- work on temp bib items seen during last 2 trips - *(nothing new)*
- 1Password (pswd. manager) - full staff implementation as staff time permits - (ongoing)
- file retention system - *aware there will be some changes coming up* - (ongoing)
- website compliance - completed >> *see note in bullet below for details...*
- website accessibility project - all forward facing files are now fully accessible via DocAccess [archived downloadable files are automatically excluded] >> *as a follow-up to notes in last month's report, I believe all of the documents required for transparency and/or compliance have been unarchived and are now made accessible through DocAccess*
- website portal for library directors: *drafted out ... - (same as last several months)*
- researching how to set up admin. user & standard user in Windows 11 *(nothing new)*
- technology inventory/tracking spreadsheet created & sent to Heather ~90% complete
- succession planning documents - draft begun & *continuing to work on...*

## Accomplishments

- website work:
  - Board mtg. agendas, minutes, & support doc.'s posted
  - unarchived audit & budget documents, to make accessible thru DocAccess
  - posted updated policy documents reviewed since 2022 EDI&A review
  - posted Agreements for Library Services, effective 7/1/25
  - posted FY2025-2028 Strategic Plan
  - updated Board Members page - *(Thanks go to John for noting it wasn't current!)*
  - posted Heather's 2/25/26 EO Go! Column
  - posted Feb. library happenings video
  - checked & updated "Community Links" page
- Sage Cataloging Mentor:
  - replied to email from Beth Ross to mentors re. proposed days/time for Circulation & Report Work Group mtgs. to ask whether it competed w/ anything we had set up...
  - emailed beginning cataloging info. to Monica
  - email reply to Lib. Dir. From Southern Wasco Co. Lib. re. Sage staff portal site, login, etc. (from email to Sage-Lib list)
  - proofed a response from another mentor to go in support of Library of Congress not removing \$v subdivisions from authority records & emailing mentor my suggestions (2)
  - emailed Cat. Mentors something new I found that we all need to be aware of re. coding Blu-ray video bib records (2)
  - reviewed new bibs - (19 bibs - began reviewing some of the January new bibs)

- Sage User Council:
  - emailed Sage Bylaws Committee members: submitted comments of possible changes; additional info.; re. setting up a time to meet via Zoom to hammer out the representation section of the Bylaws proposed changes; met with Sage Bylaws Comm. (via Zoom) to work through Bylaws changes to propose to Council and ultimately to Sage Membership, & follow-up email with revisions from meeting
  - met w/ Darci Hanning (SLO) re. Sage strategic planning next FY via Zoom
  - drafted agenda for March 17<sup>th</sup> Sage User Council meeting & emailed for feedback; & responded to feedback
  - emailed a Sage User Council Representative about correcting term expiration & passed along info. to Beth to update website listing

#### Feedback received:

- 2/4/26 - email reply from Dustin Schock (Ukiah P/SL director) after I'd sent him documentation link re. recording in-house use counts for items: "This is great. I will look into it a bit more and let you know if I have any issues or questions. Thanks Dea."
- 2/11/26 - email reply from Karey Hansen (Streamline/DocAccess customer support) after I reported DocAccess not syncing 3 documents in website after were changed from "Archived Downloadable" to "Available" & tried syncing them in DocAccess (+ multiple exchanges): "Hello Dea, Thank you again for the update. I also took a look on our side, and everything is showing as fully processed and looking great. Your kind words truly mean a lot to our team. Accessibility is something we care deeply about, and hearing that it is making life easier for the people doing the real work on the front lines is the best feedback we could receive. We appreciate your partnership and the care you take in managing your documents. If anything at all comes up in the future, we are always here and happy to help. Hope you have a fantastic rest of your week!"
- 2/12/26 - email reply from Valerie Stephenson (Southern Wasco Co. Lib. director) after I sent her a response to an email sent through the Sage-Lib email list about not being able to login to the Sage staff website (old website): "Thank you Dea! Jon also emailed me. I hadn't logged into that site in ages and I found the link in an old email that Beth sent me a long time ago. I've got the new one bookmarked now. I appreciate the help!"

#### Upcoming Events - Activities

- Access Ingenuity web.: Meeting Title II accessibility requirements: PPT Remediation Basics - Mar. 4
- Idaho Commission for Libraries web.: Privacy literacy is information literacy - March 4
- DocAccess web.: Customer check-in: updates, workflows, and Q&A - March 4
- OR State Univ. AI Literacy Center web.: Data centers & energy: what they are costing us - March 4
- Sage Circulation Work Group meeting - March 10
- Staff/Safety meeting - March 10
- Sage User Council meeting - March 17
- Sage Library Things discussion - March 18
- UCSLD Board meeting - March 19
- Sage Reports Work Group meeting - March 24
- Sage Cataloging Mentor meeting - March 25
- Vacation date - March 29
- Complimentary Cyber Ready Assessment w/ LBL Cybersecurity (LinnBenton Lincoln ESD) - April 1