



# UMATILLA COUNTY SPECIAL LIBRARY DISTRICT

Strengthening our community libraries

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## Technical Services Manager Monthly Report

Date: May 28, 2026  
Staff Name: Dea Nowell  
Time Period Report Covers: April 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>
Apr. 2026	266	372	31	0	47	3	0	0

\* 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, Echo - 6, 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:

- Pacific Northwest items in catalog (inventory) for further classification - Adams PL
- Graphic Novels inventory for further classification - Adams PL
- Children's, Juvenile, & YA Non-Fiction items (to help them match up properly between catalog and shelves) - Adams PL
- pre-cataloged items & in process items (for review at site visits): Pendleton, Stanfield, & Ukiah

### Meetings and Site Visits

- Sage Cataloging Mentor group meeting [via Zoom]: 2 (4/1, 4/29)
- Sage Cataloging work group meeting [via Zoom]: 1 (4/7)
- Staff/Safety meeting [via Teams]: 1 (4/7)
- Sage Circulation work group meeting [via Zoom]: 1 (4/14)
- Sage Library Things discussion [via Zoom]: 1 (4/15)
- UCSLD Budget Committee & Board meetings [via Zoom]: 1 (4/28)
- Sage Reports work group meeting [via Zoom]: 1 (4/28)
- meet weekly w/ Heather [via MS Teams]: 4 (4/6, 4/13, 4/20, 4/27)
- meeting w/ Heather re. technology equipment, etc., for in-service [via MS Teams]: 1 (4/30)
- virtual site visits [via Zoom]: 3 - Stanfield PL (4/28), Pendleton PL (4/29), Ukiah P/SL (4/30)

- webinars/trainings attended [virtual]:
  - Complimentary Cyber Ready Assessment w/ Linn Benton Lincoln ESD (4/1)
  - Wash. State Lib.: Online accessibility: PDFs (4/2)
  - Vector Solutions: Protection against Malware (4/6)
  - Cloud Security Alliance DE Valley Chapter web.: Shadow AI is everywhere. Here's how to find & secure it (4/8)
  - Library 2.0 mini-conference: Perspectives on AI – exploring experiences with AI in library work: attended 3 sessions – Human-centered AI: policies & practices to elevate-and safeguard-the library workforce; Introduction to key AI safety concepts, & mental models for thinking; Closing keynote: 5 whys: no easy answers (4/9)
  - April 2026 Virtual AskQC Office Hrs.: Exploring language codes beyond the MARC Code List for Languages (4/23)

### visits to/with District Libraries:

#### all libraries - 3 [email]

- email sent to all libraries re. site visit scheduling requesting 3-4 dates/ times that will work for e. lib. during April 27<sup>th</sup>-May 28<sup>th</sup> so I can coordinate around everyone's schedules
- emailed to each library scheduled site visit time for review/feedback
- emailed out individual Zoom links for site visits to each library

#### Adams PL - 10 [phone, email]

- emailed reply about changing the call #s & shelving locations for items I'd double checked on when returning a batch of additions
- called re. graphic novel shelving location – breakup or all together?, which led to a conversation about call # changes & requesting reports
- emailed replies that I'd changed call number as requested that I'd asked about & created a new shelving location for...; & to barcodes for 3 others she decided to also change (2)
- emailed Pacific Northwest inventory report
- called to verify children's, juvenile, & YA NF report to help them match up properly on shelves & catalog; & conversation about another area clarifying call #s
- called to see if there were any #s on Spanish translations of Japanese manga being added; verified publisher & website
- emailed 2 reports (Graphic Novels; and childrens, juvenile, & YA NF inventories)
- emailed reply that I'd created requested shelving location & put title there
- call rec'd re. item on pull list not producing a transit slip just goes to reshelving when trying to checkout > after doing a bit of digging discovered the patron has group fines on acct. that were placed earlier that am, thus why on pull list & not being able to checkout, as patron is barred by the amt. of fines... ; also talked about Sage User Council, as director is interested in serving > directed her to info. about the Council & gave more info.; also passed on info. about management training available in Oregon's Niche Academy

#### Athena PL - 2 [email]

- emailed reply re. barcode change for an item that wasn't checking in properly
- emailed re. an item spotted during discussion re. hold/pull list at another lib. that the status was "in transit" for a year & they might want to follow up on...

#### Echo PL - 1 [email]

- emailed reply re. her asking to move site visit back an hour, as has another meeting forgot about - to verify which direction she was talking about

#### Helix PL - 7 [phone, text, email]

- email reply re. an issue where a DVD item record is attached to wrong bib... asking for verification of a couple of pieces of info. for the DVD they have, etc., & requesting pictures (3)
- called re. above with ? about date & publishing company on the DVD they have (2)
- texted thanks for pictures & requested pictures of the DVD discs again (2)

#### Milton-Freewater PL - 3 [email, phone]

- emailed reply to cataloger re. request for an additional shelving location added for the library
- emailed reply to director after she replied to monthly statistics email & asked how the weather was here...
- called cataloger following up on email about tutorial (rec'd 2 from Sage Niche Academy – occurred w/ 2<sup>nd</sup> person being sent an invitation to Academy: sent list of tutorials to everyone)

#### Pendleton PL - 1 [email]

- emailed pre-cataloged items & in process items reports, as well as other documents (for site visit) & Zoom link

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

- emailed pre-cataloged items & in process items reports (for review at site visit) & Zoom link
- called after start time of site visit to check to see if planning to log in to site visit

#### Ukiah P/SL - 4 [phone, email]

- called to get barcode for an item (left a message) & followed up with an email (2)
- emailed reminder of looking for feedback on scheduling site visits...
- emailed in process items reports (for review at site visit) & Zoom link

#### Umatilla PL - 5 [email, phone]

- emailed reply to director re. "How long does the [Sage Annual Membership] meeting usually run?" that not sure since we hadn't had an in-person mtg. since prior to Covid...
- emailed director thanks for reaching out about an upcoming staff retirement & wanting to start another staff on CAT3 training & asked for staff's email address so I could send info. re.
- emailed staff person re. CAT3 training, etc.
- called to ask the staff person if had rec'd Sage Niche Academy invitation & "assigned" tutorials email
- emailed staff person re. info. re. her CAT3 proficiency test & will be sending note to have her added to catalog as a CAT3...

#### Weston PL - 1 [email]

- emailed reminder of looking for feedback on scheduling site visits...

#### Beth Ross [Sage Library System - Systems Administrator] - 4 [email]

- emailed reply re. potential issue w/ one of libraries, stating I'd follow up on process regarding situation with library at upcoming site visit
- email to Beth [& Heather Spry (Cataloging work group chair)] re. Umatilla PL staff achieving CAT3 proficiency - asking for login to be created & communicated w/ them, & thanks (2)
- email to make sure that both Umatilla PL & BMCC Lib. staff that achieved CAT3 have been added to the Sage-Cat email list

### Projects and Progress

- Spring 2026 virtual site visits scheduled and prepped for ~98% complete
- 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 and ongoing
- 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. agenda, minutes, & support doc.'s posted
  - posted Heather's 3/25/26 & 4/29/26 EO Go! columns
  - posted Budget Committee meeting notice and documents
- Sage Cataloging Mentor:
  - emailed reply to Kristin Williams (BMCC) re. email address for library assist. who will be doing CAT3 training
  - emailed BMCC lib. assist. info. regarding CAT3 training, etc. (2)
  - called Heather Spry (Sage Niche Academy administrator) needing assistance sending a Sage Niche Academy invitation to 2 people starting to learn cataloging (1<sup>st</sup> one produced error, Heather pushed thru; 2<sup>nd</sup> sent to me & everyone else on my team...) & follow-up emails (5)
  - emailed Kristin Williams (BMCC) re. site visit scheduling & a reply (2)
  - emailed reply to Amy Velho (BMCC lib. asst.) about what to do with CAT3 proficiency test when completed
  - emailed Kristin & Amy (BMCC) scheduled site visit time for review/feedback
  - emailed reply to Josephy Lib. cataloger re. Sage Niche Academy assigned email rec'd.

- emailed Amy Velho (BMCC) re. info. re. her CAT3 proficiency test & will be sending note to have her added to catalog as a CAT3...
- email to Beth Ross [cc'ing Heather Spry (Cataloging work group chair)] re. BMCC staff achieving CAT3 proficiency, asking login be created & communicated, & thanks (2)
- emailed Kristin & Amy (BMCC) Zoom link for site visit
- reports: pre-cataloged items & in process items pulled (for review at site visit): BMCC & emailed along with Zoom link
- emailed documents & included Zoom link to BMCC for site visit
- emailed Josephy Lib. cataloger full inventory report w/ prices included as requested
- BMCC site visit with library director and new CAT3 cataloger
- emailed Kristin Williams after site visit re. item buckets (mix-up) being cleaned up...
- emailed Cataloging workgroup (& Mentor) chair re. an agenda item for mtg.
- reviewed 164 March new bibs [imported &/or created]
- reviewed CAT3 proficiency tests: 2 (for BMCC & Umatilla PL staff members)
- **Sage User Council:**
  - emailed "save the date" to Sage-Lib email list for Sage Annual Membership mtg. (May 29)
  - emailed a drafted email re. nominations open for User Council positions to Nominating Committee members plus Beth Ross
  - began drafting Sage Annual Membership / User Council meeting agenda
  - sent email to Darci Hanning (SLO) w/ Sage Annual Membership Meeting info., as she wanted to attend to get a feel for organization since she has agreed to help with strategic plan next FY; & answering follow-up questions she had (2)
  - emailed Beth Ross asking thoughts on flow of Sage Annual meeting - combining User Council & Membership meeting or separating, as drafting agenda... & thanks (2)
  - sent email re. nominations open for User Council positions via Sage-Lib email list
  - sent emails to staff at 2 Sage libraries that responded willingness to serve on Council
  - emailed Sage Nominating Comm. re. feedback rec'd so far from email sent out via Sage-Lib email list (2 willing to serve & 1 interested party thinking about it)
  - email reply to Kristin Williams re. RSVP info. to look over before she sent out...

#### Feedback received:

- 4/6/26 - email from Amy Velho (BMCC - Library & Tutor Assistant) after I sent her email re. CAT3 training, etc.: "Thank you so much, Dea. I am really excited about getting started and appreciate all your help!..."
- 4/14/26 - email reply from Susie Hansen (Umatilla PL director) after I replied to her email about a retiring staff member and wanting to train another staff member for CAT3 level work, & asking for the email address so I could send her the info. for CAT3: "That would be great, thank you *[slightly smiling face emoji]*"
- 4/17/26 - email reply from Amy Velho (BMCC - Library & Tutor Assistant) after I sent her an email with good news that I felt she had a good grasp on the CAT3 level duties after reviewing her CAT3 proficiency test & giving her feedback re. it: "Dea, Thank you so much for all your help. I will go over this on my test. I am grateful for this experience and look forward to meeting you soon."

#### Upcoming Events - Activities

- UCSLD spring in-service - May 1
- Virtual site visits with libraries (via Zoom) - continuing through May 20
- Sage Circulation Work Group meeting - May 12
- Staff/Safety meeting - May 12
- Sage Library Things discussion - May 20
- WebJunction web.: Where is AI in 2026, and where is it going? - May 21
- Sage Reports Work Group meeting - May 26
- Sage Cataloging Mentor meeting - May 27
- UCSLD public meetings training, Budget Hearing & Board meeting - May 28
- Sage Annual Membership/User Council meeting - May 29