



# UMATILLA COUNTY SPECIAL LIBRARY DISTRICT

Strengthening our community libraries

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## Technical Services Manager Monthly Report

Date: August 27, 2026  
Staff Name: Dea Nowell  
Time Period Report Covers: July 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<br/>additions<br/>to Sage</i> | <i>* Item<br/>deletions<br/>from Sage</i> | <i>* Item<br/>corrections<br/>in Sage</i> | <i>Temporary<br/>bibs<br/>upgraded</i> | <i>*** Sage<br/>bib<br/>fixes</i> | <i>*** Sage<br/>bib<br/>merges</i> | <i>*** Sage<br/>bib<br/>deletes</i> | <i>*** Sage<br/>bib<br/>overlays</i> |
|-------------|-----------------------------------------|-------------------------------------------|-------------------------------------------|----------------------------------------|-----------------------------------|------------------------------------|-------------------------------------|--------------------------------------|
| July 2026   | 156                                     | 71                                        | 11                                        | 0                                      | 8                                 | 0                                  | 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 - 3, Milton-Freewater PL - 5, Pilot Rock PL - 1, Stanfield PL - 4
- pre-cataloged items: Milton-Freewater PL - 1, Ukiah P/SL - 1
- in process items: Milton-Freewater PL - 1

### Meetings and Site Visits

- Staff/Safety meeting [via Teams]: 1 (7/14)
- Sage Library Things discussion [via Zoom]: 1 (7/15)
- Sage User Council meeting [via Zoom]: 1 (7/21)
- UCSLD Board meeting [via Zoom]: 1 (7/23)
- Sage Reports work group meeting [via Zoom]: 1 (7/28)
- Sage Cataloging Mentor group meeting [via Zoom]: 1 (7/29)
- meet weekly w/ Heather [via MS Teams]: 4 (7/6, 7/13, 7/20, 7/28)
- UCSLD library director portal overview w/ Heather & Monica [via MS Teams]: 1 (7/9)
- performance review w/ Heather [via MS Teams]: 1 (7/10)
- webinars/trainings attended [virtual]:
  - DocAccess web.: Mastering DocAccess: document overhaul (7/1)
  - Vector Solutions: SDAO child abuse (7/8)
  - TechTalk web.: Stop the noise: turn off unwanted AI today (7/8)
  - NNLM Region 5 web.: Doing an accessibility audit of your library (7/22)
  - Access Ingenuity web.: Making accessible Excel spreadsheets: accessible design & table settings (7/22)
  - Virtual AskQC office hours: Get more from your metadata: what's new in MARC 3xx (7/23)

## visits to/with District Libraries:

### Adams PL - 3 [email]

- emailed monthly statistics to director
- email response re. getting OR State Parks day-use parking passes into catalog
- emailed an apology re. having sent an invitation to the UCSLD director's portal when I thought I was setting up to send the invitation later when it had been introduced at the Aug. Director's meeting

### Athena PL - 3 [email]

- emailed monthly statistics to director
- emailed corrected "you saved" print template
- emailed what needed to add OR State Parks day-use parking passes to catalog & would need to contact Beth for some assistance on settings in the backside of the catalog

### Echo PL - 1 [email]

- emailed quarterly statistics to director

### Helix PL - 1 [email]

- responded to email > need barcode or title/author for item asking for a call # change to...

### Milton-Freewater PL - 5 [email, phone]

- emailed monthly reports & statistics to cataloger & director (2)
- called cataloger re. email rec'd about a project they'd like to do adding bilingual sets of books that circulate together - brainstormed approaches, pros & cons, etc., with cataloger to take back to director for feedback, etc.
- emailed cataloger to touch base re. bilingual sets project
- replied to email from cataloger re. creating a template for cataloging bilingual set w/ apologies for delay in getting started on the creation...

### Pendleton PL - 1 [email]

- emailed circulation supervisor re. my patron account courtesy notice of upcoming expiration

### Pilot Rock PL - 3 [email, phone]

- emailed monthly statistics to director
- called re. email about book w/ wrong barcode - 2 in catalog w/ same title, different publishing dates, & on different bibs... so can't change the barcode > Susan cannot locate the 2<sup>nd</sup> one currently but will keep looking & let me know if anything needs to be done... (2)

### Stanfield PL - 2 [email]

- emailed monthly statistics to director

### Ukiah P/SL - 7 [phone & email]

- emailed monthly report to director
- tried to call re. email rec'd from Beth Ross - left voicemail - & tried to return missed call (4)
- rec'd call (returning my call) re. email from Beth Ross w/ pic of label on a video with barcode digits and title of video (no scannable barcode or library identifier) - we talked about time frame this one came from, how many might be in collection like this, & how to correct the problem going forward > forwarded email from Beth Ross & noted how to handle as a reminder... (2)

### Umatilla PL - 1 [email]

- emailed Arianna (teen services staff member) congratulating her on passing her CAT2 test...

### Beth Ross [Sage Library System - Systems Administrator] - 7 [email]

- email rec'd re. DVD labeling on a Ukiah DVD w/out any lib. id./scannable barcode > would follow up on
- emailed (cc. Jon Georg) re. needing some set up on back side for circ modifier, etc., for 2 libraries adding OR State Parks day-use parking permits (2)
- emailed (& Jon Georg) ? about creating a couple of filter terms for the bilingual set bib records... & replies (4)

## **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 and ongoing
- website portal for library directors: updated info., added a few items suggested by Heather, & added form for submission of items - ready for introduction to directors at Aug. Director's meeting
- researching how to set up admin. user & standard user in Windows 11 *(not much new)*
- technology inventory/tracking spreadsheet updated & sent to Heather - completed [also got all the Norton subscription licenses updated on all laptops & phones; & MS bitlocker info. for all laptops updated, printed, & placed into files in District office]
- succession planning documents - continuing to work on... (Heather gave input for reorganization)

## Accomplishments

- assisted Heather with setting up the 2 new laptops (Board/Traveler & Director's), getting connected to printers, getting recovery drives created, etc.
- website work:
  - Board mtg. agenda, minutes, & support doc.'s posted
  - July library happenings video posted
  - remediated 4 policies, fiscal year-end report (FY2025-26), & FY26-27 ALSPs (as much as possible) & posted
  - cleared several older docs off website...
  - library directors' portal: updated documents I could; & gave an overview to Heather & Monica in advance of Heather presenting during Aug. Director's mtg.
- Sage Cataloging Mentor:
  - emailed Heather Spry to thank her for including me in note that Arianna Strong (Umatilla PL) completed her CAT2 training/test
  - began work on bibliographic template & companion help sheet for bilingual set cataloging project at Milton-Freewater PL
  - emailed Lisa Hauner (fellow cat. mentor) that I'm planning to attend the mentor mtg., though not sure when I'll arrive, or may end up just listening to mtg through headphones
  - emailed Lisa Hauner (fellow cat. mentor), asking if had time to look over & give some feedback/input on the "bilingual set" template & cheat sheet I've been working on for Milton-Freewater PL (3)
  - email reply to the graduating college student (from Echo) who earlier reached out to me "about my career trajectory in the library" re. some possible dates to meet via Zoom > none worked for me, so I suggested some days/times that would work following week...
- Sage User Council:
  - emailed Beth Ross (cc Jon Georg) re. drafted Sage Council July 2026 agenda I'd sent them mid-June for review... & responded to suggested additions (3)
  - emailed Jon Georg re. minutes from May 29<sup>th</sup> annual Membership/User Council mtg. (2)
  - emailed Sage User Council meeting & Zoom link to Sage-Lib email list & to Darci Hanning (SLO)
  - emailed Jon Georg a thank you for sending a reminder to a Council Rep. about appointing someone to attend their place when they stated may not be able to attend Council meeting due to being out of office...
  - responded to email from Darci Hanning (SLO) re. some discussion points for strategic planning portion of agenda
  - emailed updated agenda, w/ Darci Hanning's discussion ?s, to Beth Ross & Jon Georg, & to Sage-Lib email list (2)
  - responded to email from Darci Hanning (SLO) w/ ? as to who would be primary contact for the Sage strategic planning process going forward...
  - emailed a response to Beth Ross re. logistical piece for User Council meeting
  - chaired the full Sage User Council meeting (there was no quorum thus I'm still chair till a new chair is elected... hopefully in Sept.)
  - responded to an apology email from a User Council Rep. that missed the meeting
  - emailed Darci Hanning (SLO) w/ an update on strategic planning portion & lack of chair election following the User Council meeting
  - emailed a draft of verbiage for garnering interest in serving on the Sage Governance/Planning Committee to be sent out via the Sage-Lib email list (then sent it out to broader Sage community via email list...)
  - emailed Darci Hanning (SLO) re. Sage Governance/Planning Committee being formed...
  - fwd. some strategic planning info. to Darci Hanning (SLO) that Jon Georg sent me after the Sage Annual Membership/User Council meeting

## Feedback received:

- 7/22/26 - email reply from Beth Ross (Sage Systems Administrator) re. draft of email for garnering interest in serving on the Sage Governance/Planning Committee: "It looks good to me. Great job and thanks for putting it together."
- 7/22/26 - email reply from Perry Stokes (Sage Fiscal Agent) re. draft of email for same above: "Email looks ready to go to me. Thanks for this initiative!"

- 7/29/26 – email reply from Heather Estrada re. Technology Inventory spreadsheet updates: “This looks great! Thanks for your work on this! I like the organizational structure now.”
- 7/30/26 – 2 email replies from Lisa Hauner (fellow cataloging mentor) re. asking if she had time to look over and/or give feedback/input on the bilingual set template & cheat sheet I’m working on...: “Of COURSE!!! Today AND tomorrow lol... I’m honored! Thank you” ~&~ “...I will make sure you are equipped and have all the information and choices you need to finalize your template when you’re good and ready...”

## **Upcoming Events - Activities**

- Sage Cataloging Work Group meeting – August 4
- Staff/Safety meeting – August 10
- Sage Circulation Work Group meeting – August 11
- Zoom w/ Milton-Freewater PL cataloger to go over cataloging bilingual sets – August 13 & 20
- Sage Reports Work Group meeting – August 25
- Sage Cataloging Mentor meeting – August 26
- UCSLD Board Meeting – August 27
- Sage User Council meeting – September 15
- Vacation: Sundays through Labor Day weekend + Sept.15 (pm) thru Sept. 18 (am)