

July 28, 2017

Deirdre Brennan, RAILS Executive Director
125 Tower Drive
Burr Ridge, IL 60527

Dear Ms. Brennan,

On behalf of the MAGIC consortium, I am pleased to submit this annual report demonstrating the value of RAILS support to MAGIC's operations. MAGIC is a multitype consortium serving 14 library agencies in the western suburbs of Chicago, with a diverse membership made up of nine public libraries of varying sizes, three schools, one academic, and one special library. FY2017 has been a transformational year for MAGIC as the Board of Directors voted on an Intergovernmental Agreement (IGA) with RAILS and SWAN to migrate into the SWAN consortium, and eventually dissolve the MAGIC consortium.

RAILS support and facilitation has been critical in leading the MAGIC membership to a viable future path. The following changes in membership are underway in the progression to dissolution.

- Saint Patrick Catholic School terminated MAGIC membership effective June 30, 2017 (standalone Follett)
- Wheaton Academy terminated MAGIC membership effective June 30, 2017 (standalone Follett)
- Poplar Creek Public Library will be terminating MAGIC membership effective September 30, 2017 (standalone Polaris)
- The following libraries have signed Intergovernmental Agreements with SWAN and will be migrating to the SWAN consortium, with a scheduled Go-Live of May 1, 2018.
 - Bensenville School District #2
 - Bensenville Public Library
 - Carol Stream Public Library
 - Kaneville Public Library
 - Messenger Public Library
 - National University of Health Sciences
 - Oak Brook Public Library
 - Sugar Grove Public Library
 - The Theosophical Society in America
 - Town and Country Public Library
 - Wood Dale Public Library

MAGIC staff have worked diligently throughout the year to support members in use of the system, as well as leading migration and data clean-up efforts to facilitate the future path of MAGIC libraries. These efforts include:

- Creation of BLUEcloud Analytics training, documentation, and consulting services which include standardization of IPLAR reporting.
- Formation of Task Forces charged with consolidating User Categories, Item Categories, and Item Types to match SWAN consortium standards.

- Review and movement of 590 data to appropriate item notes.
- Patron Purge processing as approved by the MAGIC Board.
- Inventory and weeding projects to remove lost and missing items prior to migration.
- Reconciliation of bills for missing items and long overdue items.
- Alignment of external reciprocal borrowers into a common User Profile.
- Consolidation of circulation policies.
- Review of resource sharing (in-consortium ILL) within the consortium and management of In Transit items.
- Consistent procedures for processing external ILL.

RAILS provides the essential human resources support of MAGIC, including 3 FTE staff members in FY2017, and the additional support of Anne Slaughter, Director of RAILS Technology Services in her capacity of overall LLSAP direction.

In addition to the HR resources allocated to MAGIC, RAILS provides finance, IT, and administrative support. The RAILS Financial Services team provide operational support of all accounting, audit, and banking needs of MAGIC. IT support manages the critical network and server infrastructure required to keep the ILS and member connections running. Minimal downtime has been experience due to diligent oversight and controlled management of service interruptions during non-essential times for MAGIC members. MAGIC relies on the RAILS IT department for day-to-day workstation software and hardware provision and support but also, more visibly to our members, on the datacenter services that provide reliable hosting and skilled support for our Symphony servers, website, help desk ticketing system, and other mission-critical technology services. Administrative support for member communications, board meetings, and other governance activities provides an essential supplement to MAGIC's team. The workspaces and meeting space provided by RAILS are critical for collaboration and stability.

MAGIC member libraries benefit from RAILS resource sharing activities, including participation in eRead Illinois made possible by the consortium-wide discount of 30% extended to the consortium. MAGIC staff have partnered with RAILS staff in review and testing of ILS to 3rd party services being offered and considered by RAILS for full membership. This dialog and working collaboration benefits both RAILS and MAGIC members and has proven to be a good model of technical partnership and research.

Through RAILS support and leadership, as well as the additional migration funding support, the MAGIC consortium is on solid footing for the future. While we are sad to see MAGIC's dissolution on the horizon and the unsure future of talented staff, 11 of 14 member libraries are assured continued and expanded participation in resource sharing post-migration. This next year promises to be both challenging and exciting.

Thank you for your ongoing commitment to resource sharing and shared catalogs and guidance in a sustainable automation future for the MAGIC libraries.

Sincerely,

Dawne Tortorella
LLSAP Services Manager, MAGIC

cc: RAILS Board of Directors
Jane Plass, RAILS Associate Executive Director
Anne Slaughter, RAILS Director of Technology Services



July 17, 2017

Ms. Deirdre Brennan, Executive Director
Reaching Across Illinois Library System
125 Tower Drive
Burr Ridge, IL 60527

Subject: Report to RAILS of FY2017 Support to PrairieCat

Dear Dee,

I am happy to submit this annual report to RAILS on behalf of the PrairieCat members. FY2017 was another eventful and successful year for PrairieCat, and much of what was accomplished was due to the support RAILS provides. RAILS provides 12 staff (12 FTE) to directly support PrairieCat's 127 libraries that are located in 14,000 square miles across northern Illinois. Many PrairieCat members are small public or school libraries who depend on RAILS staff support and training to be successful at their libraries. RAILS staff assigned to the PrairieCat contract made 105 site visits to members, provided 110 training sessions representing 2,197 training contact hours, and closed 2,025 help desk tickets.

The RAILS LLSAP grant opportunity was continued in FY2017 to allow libraries to join or upgrade their LLSAP membership. The Grant Park Public Library, Lena Community District Library, and Richard A. Mautino Memorial Library went live in FY17, having received FY15 LLSAP Membership grants. Grant Park, a new member, came into PrairieCat as a Basic Online member. Richard A. Mautino Memorial Library (Spring Valley) is also a new member, and joined at the Basic Online Level. Lena Community District Library was a former member at the Union List level, and is now upgraded to Fully Participating level. Johnsborg Public Library received a FY16 grant to upgrade from Union List to Fully Participating level, and will go live in December of 2017. Two libraries, Warren Township Public Library and Marseillies Public Library, received FY17 grants and will go live in FY18. Warren Township is upgrading from Union List membership to Basic Online, and Marseillies is a new member, joining at the Basic Online level.

Some other significant accomplishments during FY2017 were:

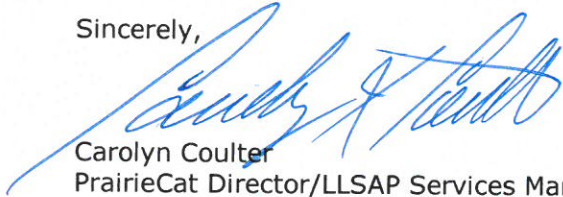
- There was one staff addition in FY17: Magda Bonny was hired to take the vacant Cataloging and Database Supervisor position.
- PrairieCat signed a new 5 year contract with Innovative Interfaces for our Sierra system. The new contract includes offsite hosting of the production environment in FY18, and complete offsite hosting of both production and training servers by FY20. The production server migration to the cloud hosted system will be completed in September of 2017.
- The third annual PrairieCat User Group Day was held on September 30, 2016 with 215 attendees. 47.33% of membership (all levels) attended PUG Day in FY17.
- PrairieCat kept pace with Innovative upgrade rollouts, and most recently upgraded to Sierra 3.1 in June 2017. Upgrades to the RedHat operating

system on the Application server were performed in June 2017 to comply with increased security requirements by our eCommerce processor, PayPal.

- More than \$4,900 in transactions on average are now processed monthly via eCommerce, and some months are well over \$5,000 in transactions.
- In order to streamline decision making processes within the organization, the two major PrairieCat standing committees were reorganized in FY17. The new Circulation and Technical Services Committees were streamlined to consist of 11 members, determined by tier level in the organization. Membership is now empowered to make decisions and recommendations directly to the Administrative Council, rather than having to recommend to intermediary groups for discussion. Positions on these bodies will be elected after FY18, thus creating Committees that are empowered by the Delegates Assembly to be decision-making bodies. A new group, the Computer Keepers, is also being developed as a resource for general recommendations and practices concerning information technology.
- In order to further enhance engagement and information dissemination among members, new "zone" based member updates were introduced. Each quarter, PrairieCat staff will travel to each of seven zones in our service area to pass along updates from Administrative Council, PrairieCat staff, and the standing committees. In return, feedback will be gathered from members. It is hoped that by going out to membership more often, minimizing travel time for members, and meeting within local areas, more members (and more member staff) will be able to engage with PrairieCat.
- A new Strategic Planning process was undertaken in FY17, with a goal to have a finished plan ready for adoption by the Delegates Assembly in October 2017. Amanda Standerfer, a local Illinois librarian and non-profit consultant, was hired by Administrative Council to facilitate this process.
- Work continues on the development of a plan for continued PrairieCat sustainability, with an eye toward staff independence from RAILS by the beginning of FY19. PrairieCat staff as well as the PrairieCat Sustainability and Finance Committees of the Administrative Council are developing a plan as well as a budget to accommodate this project.
- The FY16 audit was completed in a timely fashion by PrairieCat's auditing firm, Lauterbach and Amen. PrairieCat has a contract with Lauterbach and Amen through the FY17 audit. An RFP for audit services will be issued in FY18 for a new three year agreement.
- Work continued on adding additional statistical category tables for better call number reports. This project will hopefully be finished in FY18.
- OCLC fees were again incorporated into the PrairieCat budget for FY17 and FY18 to make distribution of those fees fairer to member libraries. Fees for Delegates Assembly lunches and the PrairieCat User Group Day were also incorporated into the FY17 and FY18 budgets for circulating libraries, to remove any cost barriers to members participating fully in these events.
- The ByLaws and General Policy Manual were updated and revisions approved, along with changes to the Circulation and Technical Services Policy and Procedures Manuals.
- PrairieCat continues to produce a popular monthly e-newsletter, *PING*, as well as a Facebook page and twitter feed.
- PrairieCat members are pleased to be active participants in the RAILS Consortia Committee, and are very excited about the resource sharing overlay project and the possibilities it promises for enhanced end user access to resources.

The support that RAILS provides to PrairieCat is greatly appreciated and allows the consortium to maintain costs and provide essential services to the 1 academic, 93 public, 31 school and 2 special library members of PrairieCat. In addition to staff support, RAILS provides PrairieCat with Information Technology, Finance, and Human Resources support. Throughout the year, RAILS staff and their expertise provide invaluable services to our PrairieCat member libraries. RAILS support enhances PrairieCat's ability to meet the consortium's shared mission of "engaging members in sharing resources effectively and equitably, expanding the quality and quantity of information accessible to our library users." As PrairieCat moves towards more independence and sustainability in future years, it is hoped that our relationship will remain strong and continue to grow.

Sincerely,



Carolyn Coulter
PrairieCat Director/LLSAP Services Manager

Cc: Anne Slaughter, RAILS Director of Technology Services
RAILS Board

July 17, 2017

Deirdre Brennan, Executive Director
Reaching Across Illinois Library System
125 Tower Drive
Burr Ridge, IL 60527

Subject: Report to RAILS on FY2017 Support to RSA NFP

Dear Ms. Brennan:

The Resource Sharing Alliance NFP (RSA) provides library automation services to public, school, academic, and special libraries in central and west central Illinois. RAILS provides invaluable support to RSA in several ways: financial, staff support, and sundry services to name a few. Without the support RAILS provides, RSA would only exist as a small organization of between 20 - 30 public libraries. With the support of RAILS, RSA is able to provide services to 145 members in their 194 locations. RSA's membership includes 93 public libraries (in 114 locations), 46 schools (in 74 locations), five academic and two special libraries. RSA member libraries serve approximately 825,000 people spread out across 14,000 square miles.

RAILS provided grant funds enabled the Quincy Public Library to migrate into RSA's automation system in February 2017. This migration has been in discussions for 12 years and only happened because of the RAILS grant. Grant funds helped three very small public libraries join RSA this year and also enabled 2 Union Listing libraries to become Basic Online members of RSA's system. Between Quincy's large collection (tied for 3rd largest in RSA) and the diverse, unique collections of the small public libraries, patrons will have an expanded pool of resources to choose from in the future.

The current RAILS-RSA contract for services includes the support of 10 FTE staff members. In addition, HR, IT, finance, vehicle, and facilities support allow staff to focus on library support, visits, and technology updates providing the best possible patron experience.

Staff supporting RSA operations make extensive use of RAILS vehicles in our visit schedule. We visit all new directors in our member libraries, most new cataloging staff, and each member library at least once every 18 months. Many of our small public libraries and almost all of our school members do not have the ability or travel budget to come to our East Peoria facility for training or meetings. Providing training, orientation and support visits onsite helps to keep our members functioning.

FY18 is the last year of the three-year RAILS-RSA support contract and the future is currently uncertain. With this in mind, RSA has begun taking steps to become more self-sufficient. RSA, at its current membership mix and size, will never be 100% self-sufficient. Of our 145 members, 107 of them pay \$2,470 or less per year in fees. Only 13 members pay over \$9,000 a year and provide 57% of RSA's income. This means RSA's budget is very tight and we can't afford to lose any large libraries. To offset the potential loss of help from RAILS, RSA raised rates 4% last year and will continue raising rates 4 to 6% a year for the foreseeable future. This means we will lose some schools and possibly small public libraries. For comparison purposes, please

note that RSA does not redistribute OCLC costs internally to make them 'fairer' to member libraries. All RSA members pay OCLC directly making consortia dues appear far lower in RSA than in other consortia. RSA member libraries pay an additional \$190,000 a year to OCLC.

In addition to raising RSA membership fees, RSA recently finalized pricing on a 7-year contract extension with our automation vendor SirsiDynix. After 9 months of price negotiations, the new contract freezes costs at FY18 levels for three years and caps annual increases to 1.9% for years 4 – 7. The contract also drops modules RSA didn't fully utilize, provides additional online catalog enhancements and will drastically reduce our locally hosted and supported hardware requirements as SirsiDynix will be hosting most of our automation system on their servers. Outside of RAILS-RSA contract costs, this is the largest line item in the RSA budget and there is no additional cost cutting available from our vendor.

RSA appreciates the 30% rebate for eRead Illinois provided by RAILS for signing up 100% of our automated members. RSA added eRead into the RSA budget at the consortia level to ensure the majority of RSA member libraries, most notably our school libraries, have access to eBooks. The service is only affordable at RSA level due to the rebate.

Major accomplishments in FY17 include:

- Migrating Quincy Public Library into RSA. This required thousands of hours of staff time, about 30 total days of staff time spent at the Quincy Public Library training or working directly with Quincy staff, and a great deal of interfacing with SirsiDynix.
- Setting up four new libraries in RSA's system for the other new members joining RSA.
- Lots of onsite catalog training for our new or upgrading libraries who started prior to the Quincy migration spun up full time.
- A full catalog deduplication to integrate the Quincy PL standalone MARC records onto RSA MARC records. This enables Quincy items to appear with other RSA library's items rather than on their own records and greatly enhances system-wide holds.
- A full rollout of the new BLUEcloud Analytics reports tool that RSA helped develop with SirsiDynix over the previous 3 years. RSA staff presented three different sessions on this subject at the worldwide SirsiDynix Users Conference in April 2017.

RSA's Board of Directors and membership greatly appreciate the contributions of RAILS to keeping our consortia alive and vibrant. Without RAILS support, RSA would not be able to support the types and numbers of libraries we currently support. RAILS also helps tie all consortia in the RAILS service area together and enables intra-consortia knowledge sharing and collaboration making us all stronger. In these times of uncertainty, our partnership with RAILS has provided stable resources for our members allowing them to focus on patron needs without worrying about the future of their automation system. Thank you for making it easier and more cost effective to continue to automate the libraries of central and west central Illinois.

Sincerely,



Kendal T. Orrison

LLSAP Services Manager / Executive Director, Resource Sharing Alliance NFP

Cc: Anne Slaughter, RAILS Director of Technology Services

Cc: RAILS Board of Trustees



August 1, 2017

Deirdre Brennan, Executive Director
Reaching Across Illinois Library System
125 Tower Drive
Burr Ridge, IL 60527

Subject: Report to RAILS of FY17 Support to SWAN

Dear Ms. Brennan:

In accordance with the terms of the RAILS-SWAN support agreement, SWAN is providing a report of how RAILS support has improved, enhanced, and sustained services to the citizens of Illinois. SWAN currently provides services to 78 public, academic, and special libraries in the Chicago metropolitan area that benefit directly from the support and activities of its regional library system.

First and foremost, RAILS support overall keeps SWAN affordable to our member libraries. The coordination and collaboration with RAILS allows SWAN to continue its commitment to mission-critical library services while focusing on valuable enhancements. During the fiscal year 2017 (FY17) SWAN worked on several projects under the RAILS umbrella in coordination with its LLSAPs MAGIC, PrairieCat, and RSA to improve services across the region for SWAN libraries. RAILS continues to provide a suite of services and expertise to its LLSAP, allowing their operations to run smoothly and meet the demands of its member libraries.

RAILS LLSAP Automation grant opportunities in allowed two new libraries to afford the startup and data migration costs to join SWAN. The grant has allowed two neighboring consortia libraries to join SWAN. This project met the highest priority of the grant— “mergers and partial merges of existing consortia into an LLSAP” – and will bring huge resource sharing benefits to all the 1.2 million library cardholders. This RAILS grant program has been wildly successful in that multiple consortia merged during its existence and over 40 individual libraries benefited from the high-octane resource sharing that library consortia like SWAN provide. We are disappointed to see this grant program suspended by RAILS for FY18, and would like to see it reinstated as soon as possible.

Some other significant accomplishments during the past fiscal year were:

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www.swanlibraries.net

- BLUEcloud Analytics launched for the entire consortium with weekly classes offered since December 2016 on using Analytics to assist with board reports, collection analysis, as well as IPLAR reports
- Launched a comprehensive library notification system for all SWAN library card holders, allowing patron choice in being notified by text message, email, automated phone calls, or via US mail.
- Integrated the Hoopla Digital service into the SWAN catalog to include a platform that provides a wide range of digital content (audio books, movies, music, ebooks, comics, and TV).
- Enhanced and improved the SWAN catalog through feedback gathered through librarians and patrons, which included improving new search limits by material format or fiction/nonfiction.

SWAN also utilizes RAILS Finance for services. The financial expertise provided has allowed SWAN to function under sound guidelines and practices following the accounting principles of GASB for better budget planning and management of its funds contributed by its member libraries.

The support SWAN receives through RAILS allowed SWAN in FY17 to continue its second-year lock on 13% lower membership fees. RAILS LLSAP funding is directly used to lower library costs for membership in SWAN. The SWAN Board and membership appreciates this financial support from RAILS especially during this period of uncertainty with the State of Illinois budget.

Sincerely,



Aaron Skog

SWAN Executive Director

CC: Anne Slaughter, RAILS Director of Technology Services
RAILS Board