

19 April 2019

TO: RAILS Board of Directors

FROM: Deirdre Brennan

SUBJECT: Executive Director Report – April, 2019

Promote, support, and expand resource sharing to optimize use of tax dollars and other funding and help libraries share resources to the fullest extent possible

April meeting with IHLS staff and ISL staff

On April 4, members of the executive team and I traveled to Springfield to meet with Greg McCormick, members of his staff, and leadership from IHLS. We discussed many topics of mutual interest including:

- Possibility of CARLI brokering e-resources beyond their membership
- Funding of statewide database access for all system members
- Development of a coordinated continuing education plan among ISL, RAILS and IHLS
- Delivery
- OCLC contract
- ISLAC meetings resuming in September.

It was a very good meeting. We all agreed it is important to get together in person and plan to meet quarterly going forward.

Explore More Illinois

There is a detailed report about this project in your packet, and Jessica Barnes will talk in more detail at the meeting.

Work with libraries of all types to tell the library story

I did a podcast with Annie Bostrom who works as an editor for *Booklist* at ALA. We talked about the ALA Carnegie Medals that are given annually for excellence in fiction and non-fiction. It was a great pleasure to talk about books!

I also did an interview with staff from Literacy DuPage. We talked about the work that their organization does in collaboration with libraries. The interview will be published in their newsletter.

Help libraries be the best they can be

Member engagement activities

I visited the Oak Lawn Public Library on April 9 to meet with their public services staff and talk about leadership. It was great fun and interesting.

I met with Antonia McBride, Director at the Harvey Public Library District and Jamie Rachlin, a financial consultant, on April 15. Jamie and RAILS will be assisting Harvey with budget analysis and preparation and board training. Joe Filapek and Jamie will be attending the next Harvey board meeting on May 9.

I attended the Cicero Public Library board meeting on April 8 to discuss the system membership standards and their hiring of a new library director.

Mary Witt and I talked with Kim Caviness from Imagination about producing a video that will show why libraries are needed more than ever in the Internet age.

On the morning of April 4, I attended a meeting about the 2020 Census in Springfield. It was a great opportunity to connect with other organizations and agencies that will be part of the statewide push to get a complete count. I made a number of great contacts for future collaborative projects related to the census and even beyond.

Prepare libraries for the future

DPLA Fest

I attended DPLA Fest April 16 through April 18 (as did other RAILS staff, Anna Behm, Dan Bostrom, Jane Plass and Margae Schmidt). It was a terrific conference with a huge amount of information about new digital projects that libraries are working on. Of particular interest was the new partnership among DPLA, the New York Public Library and LYRASIS to support expansion of the Simply e platform. We have discussed this platform at previous meetings; it will federate access to e books and audio books to create a single search for library users. This is obviously great for users and great for libraries as it creates better access to library e content and will undoubtedly result in higher circulation of materials.

Aim to be the best library system in the country

New staff started at RAILS in April. Grant Halter, our Data Coordinator and Research Analyst; Anna Duff and Stacy Palmisano, new Administrative Assistants; Diana Rauch, CE Specialist, and RAILS staffer Margae Schmidt was promoted to CE Specialist from Administrative Assistant. Leila Heath starts as Library Resources and Programs Manager on April 29.

The Nominating Committee met on April 15. We have an excellent roster of candidates. All seats are contested. The roster is:

At-Large Seat Candidates

Selina Gomez Beloz, Waukegan Public Library
 Kellie Kerns, Rock Island Public Library
 Micheal Kott, Morton College (Cicero)
 Sarah McHone-Chase, Northern Illinois University (DeKalb)
 Andy Murgas, Matteson Area PLD
 Scott Pointon, White Oak Library District (Crest Hill, Lockport, Romeoville)
 Chris Schafer, Augustana College (Rock Island)
 James Scholtz, McHenry PLD
 Samantha Wilhoyt, Bourbonnais Public Library
 Richard Young, Brown County PLD (Mount Sterling)

Public Library Trustee Candidates

Susan Busenbark, Kewanee Public Library
Percy Harris, Homewood Public Library
Dianne Hollister, Bloomington Public Library
Rosemary Kauth, Zion-Benton Public Library
Maria Sinkule, Addison Public Library

Special Library Seat Candidates

Halle Cox, Kane County Law Library (St. Charles)
Gretchen Rings, Field Museum Library (Chicago)
Robin Survis, Caterpillar (Mossville)
Penny Sympson, Wiss, Janney, Elstner (Northbrook)

This Month at RAILS – April 2019

Promoting/Supporting/Expanding Resource Sharing

Leading/Working with Libraries to Expand Resource Sharing

International Collaboration on Resource Sharing

Jane Plass attended the spring meeting of the [International Coalition of Library Consortia](#) in Vancouver, Canada, April 7–10. RAILS helped sponsor the meeting, and Jane also served on the program planning committee. Session topics included:

- Collaboration within a consortium and between consortia
- Equity, diversity, and inclusion
- Patron authentication, including consortial issues and privacy concerns
- Controlled digital lending, an emerging form of interlibrary loan in which print books owned by a library are digitized. The print book is then taken out of circulation, and the digitized version is loaned to a single person at a time.
- Open access, which provides access to research results free of cost or other barriers. The shift away from subscription-based access to journals to open access has enormous economic implications for universities, colleges, libraries, and publishers.

Exposing Consortial Holdings Working Group

Five Illinois consortia (CCS, PrairieCat, RSA, SHARE, and SWAN) currently batchload holdings information to OCLC via a service called OSMOSIS. (Batchloading is a process where records are collected into batches. The records in a batch are loaded all at once.) This is being funded by grants from the Illinois State Library. As of July 1, 2020, OSMOSIS will no longer be available.

The [Consortia Committee](#) has approved a [charge for the Exposing Consortial Holdings Working Group](#). The group will explore the big picture questions around the work being done and the reasons for it, to help determine strategic priorities for exposing consortial holdings on the web and facilitating resource sharing in the absence of the OSMOSIS service.

Providing Access to Digital Content/E-Resources/Other Innovative Projects

RAILS Launches BiblioBoard Facebook Ad Campaign

To help spread the word about the many offerings available at no cost to anyone in Illinois via RAILS' partnership with BiblioLabs, we are experimenting with a paid social media campaign on Facebook. (An example of one of the ads appears below.)

ANNE
of
green gables
L.M. MONTGOMERY

RELAX WITH AN E-BOOK THAT THE WHOLE FAMILY WILL LOVE!
AVAILABLE FOR FREE FOR ANYONE IN THE STATE OF ILLINOIS.

biblioboard

BROUGHT TO YOU BY RAILS AND YOUR LOCAL LIBRARY.

The campaign launched on April 2 and will run for eight weeks. It will focus on a number of different BiblioBoard resources, including: books for youth and families, classic works of literature, homeschooling materials, and books by local authors.

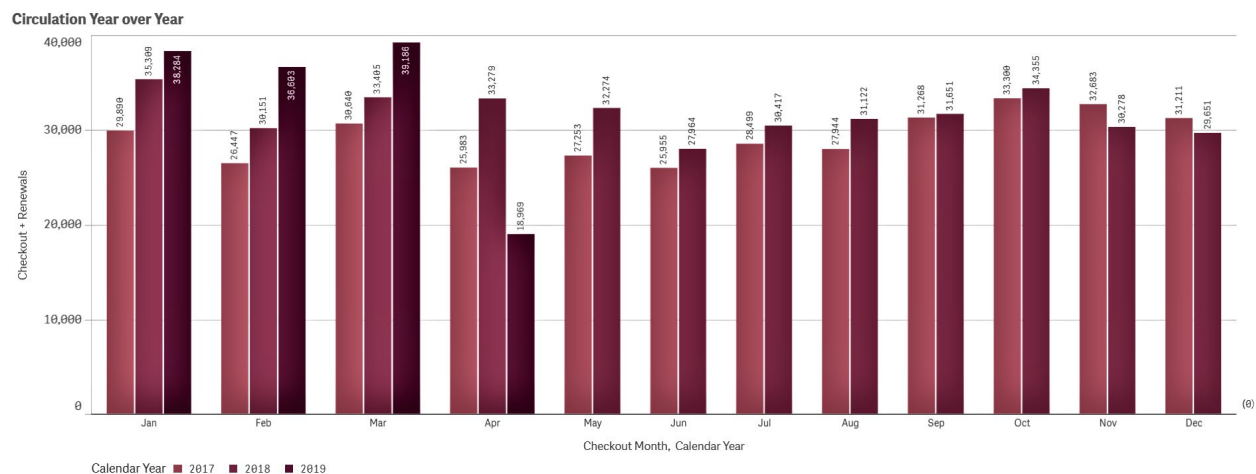
More E-Books Added to BiblioBoard Time for Kids Module

We've been updating the board about the new educational content we've been adding to [BiblioBoard](#), including the Time for Kids module, featuring nonfiction readers and Teacher Created materials, with a focus on science, math, and social studies. We're adding 50 additional e-books from Time for Kids to this module. You can view this and other BiblioBoard modules by cutting and pasting this link into your web browser: <https://library.biblioboard.com/modules>.

eRead Illinois Axis 360 Update

April is the start of the renewal process for our [eRead Illinois](#) member libraries. We sent renewal notices at the beginning of the month. The response has been good, with most libraries quickly completing the first step in the process. There is one notable cancelation, Oak Park Public Library. They cited the desire to consolidate their e-content services as the reason for canceling.

In other news, circulation of the eRead Illinois Axis 360 collection is up for the first three months of this year compared to previous years as you will note from the graph below.



Building Collaborative Relationships & Fostering Networking

RAILS Member Meetup in Barry

On Tuesday, May 7, RAILS will host a member meetup at Barry Public Library. The meetup will include an update on RAILS projects and a series of small group discussions, as well as a tour of the library. Attendees are invited to stick around after the event to have lunch at the café next door. RAILS Board members are welcome to attend this meetup – [register on L2](#).

First RAILS Online Round Table a Success!

On Friday, April 5, RAILS held its first online round table featuring the [Serving Patrons with Dementia networking group](#). Over 80 people registered and around 35 people participated in the live event. The event include a short presentation by Tina Williams from White Oak Public Library and David Kelsey from St. Charles Public Library, followed by a general discussion of programming and collections for those with Dementia or Alzheimer’s disease.

The next online round table will be on Wednesday May 15, and will feature the [20s and 30s Programmers networking group](#).

Telling the Library Story

Helping Members Tell Their Story

RAILS Kicks off Series to Help Members Tell Their Stories with Data

On our recent survey to find out how RAILS can best help libraries via our [My Library Is... campaign](#), members told us that they needed help using data to tell their stories. In April, we began a continuing education series, [“Getting the Most from your Library Data”](#), to help members think more strategically about the data they collect and to utilize it to the fullest extent possible.

The series includes:

- “Using your Data Superpowers for Good” – April 24
- “Developing a Scalable Strategy for Gathering and Reporting Analytics” – [May 9](#)
- “Cleaning your Data with OpenRefine” – [May 16](#)
- “Simple Spreadsheets – Data Analysis Techniques and Time-Saving Secrets” – [June 13](#)
- “Great Graphs: Transform Spreadsheets into Stories with Data Visualization” – [June 20](#)
- “Report Redesign” – [June 27](#)
- “Introduction to Statistics for Librarians” – [July 10](#) and [July 11](#)
- “Wrangling Library Patron Data Privacy” – [July 18](#)

Board members are welcome to register for any of the upcoming sessions via L2 – click on the dates above for more information.

Aiming to Be the Best Library System

Member Communication/Engagement

Member Visits in Bloomington Area

RAILS visited four public libraries in the Bloomington region in March: El Paso, Dominey, Lexington, and Flanagan. Highlights include viewing Dominey's historic building, seeing Flanagan's homemade escape room kit, and learning more about El Paso's Reading Parties that are co-hosted by the local middle school.

Record Number of Registrants for April RAILS Member Update

A record number of 155 RAILS members registered for the April 11 RAILS Member Update. There was a lively discussion of the minimum wage increase in Illinois and how libraries can best respond. RAILS will be working with the Illinois Library Association to help members in the future, including providing continuing education opportunities related to the issue.

Other update topics included membership standards; RAILS' *My Library Is...* campaign to help all types of libraries promote their value more effectively; SimplyE, a platform for providing library patrons with greater access to e-books; RAILS' new Explore More Illinois cultural pass program which launched on April 1; and more.

Board members can watch a recording of the update on the [RAILS YouTube page](#). The next member update is Thursday, July 18, at 10 a.m. Stay tuned for further details.

RAILS Engages with Youth Services Staff at Illinois Youth Services Institute



RAILS was a sponsor of the 2019 Illinois Youth Services Institute in Bloomington, March 21-22.

Dan Bostrom, RAILS Member Engagement Manager, single-handedly staffed the RAILS table in the exhibit hall. Approximately 92 youth services staff members from RAILS libraries stopped by to spin our famous wheel and to find out what RAILS can do for them.

Delivering on the Promise of Organizational Excellence

Replacing L2 Grant Update

RAILS received special grant funding from the Illinois State Library to replace L2 (librarylearning.info). Originally conceived as a continuing education calendar and membership directory, L2 has evolved into a critical tool for library staff and library systems across Illinois, and the platform can no longer support our evolving needs. RAILS anticipates the project will take the full 18 months of the grant period.

In April, the RAILS L2 project team (Anne Slaughter, Brian Smith, Wesley Smith, and Jody Rubel) facilitated a statewide series of town hall meetings with representatives from stakeholder organizations (April 19 in Burr Ridge, April 24 in Edwardsville, and April 25 in East Peoria). The input gathered at these meetings will help us to finalize important planning documents such as the features and functions list and the directory and calendar database fields. These will then be incorporated into the RFP for a vendor to do the development work.

Consortial Reports

CARLI/I-Share

- Ex Libris Alma has been chosen for our next I-Share platform, replacing Voyager and SFX in 2020 for the 91 institutions that are part of CARLI's I-Share resource sharing system. CARLI's Ex Libris Alma Primo VE migration project has three major phases:
 - Phase 1: Onboarding, January 2019–February 2019
 - Phase 2: Vanguard, March 2019–June 2019
 - Phase 3: Implementation, July 2019–June 2020

CARLI created an Alma Primo VE web page on the CARLI website, including an FAQ for the project:

<https://www.carli.illinois.edu/products-services/i-share/alma>

- The first in-person session of “CARLI Counts: Analytics and Advocacy for Service Development” was held at the I Hotel in Champaign on February 19–21, 2019. Forty team members and eight mentors participated. Evaluations from both days were overwhelmingly enthusiastic, citing the power of teamwork and the consortium. Many attendees were excited to learn about ways to get started on this important initiative. CARLI Counts, an Institute of Museum and Library Services grant project, is a continuing education library leadership immersion program that prepares librarians to make effective use of research findings on the impact of academic libraries on student success for the twin purposes of service development and library advocacy.
- CARLI is wrapping up negotiations on a new agreement for the database package provided at no direct cost to all members. CARLI is also pursuing an RFI for consortially-sharable e-books.
- New CARLI services include a website design service based on LibGuides and designed by NC Live, the North Carolina library consortium. A webinar for interested members is slated for April 18 at 10:00 a.m.
- CARLI will welcome the Chicago History Museum as a new Governing Member on July 1.
- CARLI has a wealth of wonderful continuing education offerings on the horizon.
 - OER Forum, April 29, Loyola University, Chicago
 - 2019 New Directors Institute, May 15–16, CARLI Office, Champaign
 - CARLI Instruction Showcase, May 23, North Park University, Chicago
 - Mid-level Leaders Symposium: CARLI's Next Deans and Directors, date TBD, Holiday Inn, Champaign (Registration fee to be charged)
 - ACRL Roadshow: Standards for Libraries in Higher Education, date and location TBD (Registration fee to be charged)
- Don't miss any CARLI news! You don't need to be a CARLI member to sign up our Announce email list; it's open to all. Sign up at <https://carli.illinois.edu/mailman/listinfo/announce>

Cooperative Computer Services (CCS)

- Morton Grove Public Library's go-live was a success. CCS libraries were able to resume circulation ahead of schedule, and Morton Grove began circulating on January 15.
- In January, the CCS Governing Board approved Indian Trails Public Library District's request for membership. CCS staff are working with ITPLD and Innovative towards an October go-live.
- CCS will host a Governing Board retreat in June as part of our evaluation of our governance structure. We are continuing work to update policies after reorganizing our policy manually thematically.
- In March, the Governing Board voted on an extended strategic plan. This plan updates our 2016–2019 plan and extends it until December 2020. Two new goals were added to existing initiatives:
 - Determine ideal membership size based on CCS goals and values, staffing, and geography.
 - Gauge member interest in centralized cataloging and research potential models.

- CCS staff worked with Innovative and StackMap to resolve ongoing issues. Innovative developed a patch to resolve issues with conflicting SQL jobs. StackMap revised its code to stop interference with some PowerPAC features.

LINKin

- No report

Northern Illinois Cooperative (NIC)

- The Northern Illinois Cooperative migration to PrairieCat continues to move forward. The go-live date is set for May 21, and we are on target to meet that. Staff training is a priority for the next couple of months. Sessions are being held both in person and online. Fortunately, since NIC is migrating from Millennium to Sierra (both under the Innovative umbrella), many things are similar, so that is making it easier for staff.

Pinnacle Library Cooperative (PLC)

- Pinnacle recently upgraded to the latest version of Polaris—Polaris 6.2. One of the features in the new update allows the OPAC to display similar titles in a patron's search results. When a user searches the catalog, if no copies of a particular title are currently available, a carousel will display with related materials that are currently available at the patron's library. The update also included further enhancements to Leap, the web-based version of the ILS.
- Work continues on the SimplyE pilot project. So far, we have ingested collections for OverDrive, cloudLibrary, Axis360 and BiblioBoard. We'll soon be given access to an early version of an app that will allow us to begin preliminary testing.
- The Pinnacle Library Cooperative Governing Board is in the process of revising its bylaws. The primary changes include the removal of outdated sections, updates to use consistent language throughout, and an explanation of the Cooperative's cost-sharing formula.

PrairieCat

- PrairieCat is still very busy with the upcoming go-live of the NIC libraries. The eight NIC libraries will join PrairieCat on May 21, 2019 and begin circulating on our system. We are currently working hard on data configuration, migration, and training for these new members.
- Our spring round of Member Updates were held from March 25–29. Member Updates are meetings with our membership throughout our service area for the purpose of outreach, information dissemination, and feedback, and have been held every spring and fall for the last two years.
- PrairieCat has implemented a new learning management system, Talent LMS, to help with our training initiatives. An evaluation of current training practices is underway. Our goal is to create a more responsive and effective training program for members.
- Nominations are open for Administrative Council and standing committee seats, with elections set for May 13–24.
- Our next Resource Sharing Summit will be held on Friday, May 17. We will again engage Amanda Standerfer to facilitate our open discussion of “hot” topics from our Resource Sharing Committee.
- Planning is also underway for the 2019 PUG Day (PrairieCat User Group Day), which will be held on September 20 at Northern Illinois University's Rockford center. More information will be forthcoming as we get closer to the event.

Resource Sharing Alliance NFP (RSA-NFP)

- RSA continues to work with three new libraries that are joining RSA.
 - Flanagan Public Library District is mostly finished with cataloging.
 - Ransom Memorial Public Library in Altona is cataloging.
 - Williamsfield Public Library District is cataloging.

- We have filled our Senior Cataloging and Database Specialist position by hiring Jane Bradbury. Jane brings an academic library background and perspective to the RSA staff. She started in January and has fit in well with the team.
- RSA's FY2020 budget was approved by the Board of Directors. The Board also approved the start of a strategic planning process that will also help us determine new membership levels and a new fee structure. We expect this process to run in two phases and last approximately two years. The second year will be for the fee structure revamp.
- In project news, staff continue working on long-term projects, including our new BLUEcloud Mobile app. We've run into some e-book configuration issues and are working with SirsiDynix to find the correct configuration. We are also in the final phase of reworking our job descriptions and adding a new Member Services User Experience Coordinator job description so we can fill that position soon. Finally, RSA staff continue to define our priorities and data elements in preparation for moving our help desk and customer relationship management (CRM) functions into Salesforce.

Rock River Library Consortium (RRLC)

- RRLC met in March and approved working with RAILS to implement NCIP with Find More Illinois and The Library Corporation software RRLC uses, beginning in FY2020. Sterling High School has decided to join Find More Illinois.

System Wide Automated Network (SWAN)

- Green Hills Public Library District is now live on SWAN. The data migration and January 29 go-live were very smooth events. The first week at Green Hills was planned with SWAN staff on site to help answer library staff questions. Due to the polar vortex the Chicago area experienced that week, we extended our on-site presence into the following week when Green Hills patrons returned to the library. Green Hills is the 25th library to join SWAN over the past 10 years.
- The SWAN FY2020 budget was approved by the membership at the March Quarterly meeting. This budget reflects operating budget increases with SirsiDynix, OCLC, EBSCO, and Unique Management Services. Some increases are from software licensing adjustments due to SWAN adding 20 libraries, and others are due to additional SirsiDynix services. The personnel, benefits, and facility budget lines have no increases from FY2019.
- In March, SWAN announced an internal staff reorganization on our staffing arrangement. Details on the changes and the vision behind them are detailed in the [staff restructuring plan](#). SWAN will be arranged into four service units:
 - Administration
 - Bibliographic Services
 - Information Technology and Support Services
 - User Experience

This eliminated the Member Services department; those six staff were moved into the four service units.
- [SWAN's 2019–2023 strategic plan](#) is now posted on the SWAN Support website. This plan contains six objectives for the next five years.
- SWAN has moved to infrastructure-as-a service. We migrated to Microsoft Azure in January. Overall, the experience in the new server environment has been positive, with increased server performance amounting to the completion of many reports in a fraction of the time previously needed. Most notably to the membership, weekday morning reports (including acquisitions) are running on schedule most days, occasionally with long periods of report queue inactivity. In our previous environment, morning reports could often run up to an hour behind schedule, with the only breaks in the queue during the midafternoon.
- In an effort to ensure the efficiency and success rate of our patron notification emails from the Azure environment, SWAN IT staff have spent extensive time researching and seeking quotes for third-party volume email delivery services to improve the overall reliability of SWAN emails, provide a monitoring

dashboard to keep track of the bounce rate, and even potentially provide graphic templates to enhance our notification service.

- SWAN is providing a mobile app to all libraries as part of the current and FY2020 budget. We sent out a survey to our member libraries to request their events RSS feeds and a review of their library's name and locations served as it will appear in the app stores. The expected go-live in the Apple and Google Play stores is late April.
- SWAN's 2019 annual patron record purge is now complete. The criteria for this year's purge were:
 - Records with an expiration date before 01/01/2016 if the library expires their cards
 - Records with a last activity date before 01/01/2016 if the library does not expire their cards
 We used BLUEcloud Analytics reports to identify the patron records that fit the purge criteria. Records cannot be removed if there are any bills, checkouts, reading history, or holds. Once we created a list of user records that fit the purge criteria, we removed the reading histories for the records. We confirmed that access via Enterprise, as well as direct access through the e-resource app (e.g. Overdrive, Axis 360, Hoopla), updates the last activity date of library patrons with each provider. Confirmation of this allowed us to move forward with the reliance on last activity date to determine inactivity.
- SWAN rolled out several changes to the Enterprise catalog in February. These changes were made as a result of the Fall 2018 Enterprise usability study conducted with library patrons.
 - We added the following facets to the Format facet in Enterprise:
 - eBook
 - eAudiobook
 - eVideo
 - eMusic
 - We provided new icons for all of our formats, including new downloadable format icons that feature a unifying "download cloud" to make it clearer what is a download and what is a physical item.
- The SWAN User Experience Team is conducting an evaluation of the current landscape of online catalog (OPAC) and discovery platforms. The goal is to establish a shared understanding of the options available to us. From there, our membership can better determine the next steps for our online catalog. We shared a draft of a discovery platform evaluation matrix with our Discovery & User Experience Advisory Group and defined what discovery platforms will be in scope for our evaluation.
- SWAN's strategic plan objective 3 specifies that SWAN will review its governance structure and provide recommended changes. Committee work will begin after the SWAN Board is presented with an overview of the process of converting the SWAN organization to a 501c3 entity. Based on the tactical plan, the 501c3 analysis should be completed by July 2019. The committee will begin work some months after the SWAN Board decides on the 501c3 status. Once the pros and cons of the 501c3 conversion are understood, the SWAN Board Governance Study Committee can decide on how bylaws should be revised and what the SWAN membership agreement would look like, along with representation.
- The planning group for the annual SWAN event (SWAN Expo 2019, aka the "SWANx19" Event) held its first meeting. We are envisioning the event as a SWAN library community "expo" where libraries can showcase efforts taken in programs, collections, and technology to engage the communities they serve.