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:
    - o Phase 1: Onboarding, January 2019–February 2019
    - o Phase 2: Vanguard, March 2019–June 2019
    - o 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.
    - o OER Forum, April 29, Loyola University, Chicago
    - o 2019 New Directors Institute, May 15–16, CARLI Office, Champaign
    - o CARLI Instruction Showcase, May 23, North Park University, Chicago
    - o Mid-level Leaders Symposium: CARLI's Next Deans and Directors, date TBD, Holiday Inn, Champaign (Registration fee to be charged)
    - o 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:
    - o Determine ideal membership size based on CCS goals and values, staffing, and geography.
    - o 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:
  o Records with an expiration date before 01/01/2016 if the library expires their cards
  o 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.
  o We added the following facets to the Format facet in Enterprise:
    - eBook
    - eAudiobook
    - eVideo
    - eMusic
  o 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.