

# Consortial Reports

Updated July 15, 2019

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## CARLI/I-Share

- I-Share Migration
  - Migration to Ex Libris Alma/Primo VE from Ex Libris Voyager is moving along according to schedule for the 91 institutions that are part of CARLI's I-Share resource sharing system. June 24, 2020, is the go-live date.
  - The 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 that includes an FAQ for the project. See <https://www.carli.illinois.edu/products-services/i-share/alma>.
- CARLI Counts
  - The second in-person session for Cohort One of “CARLI Counts: Analytics and Advocacy for Service Development,” will be held in Champaign at the I Hotel from July 15–17, 2019. Forty team members and eight mentors are in the first of two cohorts. Cohort One participants will display their posters at the CARLI annual meeting, scheduled for November 15, 2019.
- Networking and Career Fair
  - CARLI will host its first-ever Networking and Career Fair in partnership with the iSchool at the University of Illinois at Urbana-Champaign on November 14, 2019. The “Recruiter’s Guide” ([https://www.carli.illinois.edu/sites/files/files/Recruiter%20Guide\\_iSchool-CARLI-Fair.pdf](https://www.carli.illinois.edu/sites/files/files/Recruiter%20Guide_iSchool-CARLI-Fair.pdf)) gives more details about the event. Please join CARLI and the iSchool; any type of library is welcome to attend. A mixer with students and employers will follow the fair.
- E-Books and E-Resources
  - Responses to the Request for Information for Consortially Sharable E-books were due at the end of June. After agreements with vendors are reached, CARLI members will be able to select e-books for purchase.
  - CARLI is meeting with representatives from RAILS, Illinois Heartland Library System, and the Illinois State Library on July 10, 2019 about brokering e-resources for ILLINET member libraries. CARLI hopes to offer e-resources to ILLINET members using the administrative infrastructure of its existing program.
- Continuing Education
  - CARLI has a wealth of wonderful continuing education offerings on the horizon.
    - CARLI Counts, Cohort One, second in-person session, July 15–17
    - Project Outcome Toolkit Webinar, July 19
    - Mid-level Leaders Symposium: CARLI’s Next Deans and Directors, September 25, Holiday Inn, Champaign (Registration fee \$50)
    - ACRL Roadshow: Standards for Libraries in Higher Education, October 29, University of Illinois at Chicago (Registration fee \$45)
    - CARLI/iSchool Career Fair and Mixer, November 14, Holiday Inn, Champaign
    - CARLI Governing Directors Meeting and Annual Meeting, November 15, I-Hotel, Champaign
- 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)

- We have hired Kathleen Weiss, currently at Niles-Maine District Library, as our new User Experience Specialist. She will start July 22.
- We are currently recruiting for a Member Services Librarian for technical services. The position is open until filled.
- The Governing Board held a retreat on June 12 at the Fremont Public Library District, facilitated by Library Strategies. The group discussed their values and goals for CCS as they related to governance and began to prioritize them. We will follow up with a report from Library Strategies, and the Long Range Planning Committee will develop recommendations for Governing Board.
- Our eContent Task Force is examining patron authentication options to determine if CCS should offer an optional or core shared solution.
- The addition of Indian Trails Public Library District is moving along well. Innovative is prepping a load testing plan, to be implemented in late July.
- CCS has worked with Innovative to identify a software issue that was causing intermittent performance issues. Currently a patch and additional monitoring are mitigating the issue, and we are looking forward to a permanent fix in Polaris version 6.3. Our test upgrade is planned for July 16.

## LINKin

- No report

## Pinnacle Library Cooperative (PLC)

- In July, Pinnacle's OverDrive collection will roll out a new "Instant Digital Card." This feature will allow patrons to access our e-content collection, even when they haven't yet registered for a library card, by using their mobile phone number as a temporary login. Upon registration, if OverDrive can verify that the number is linked to an address in our general service area, the patron will immediately be given access to the collection. Patrons will be able to use this account as a trial, but after the initial three-month period, they will need to visit one of our libraries to obtain a full library card.
- Pinnacle's database committee has also renegotiated the consortium's EBSCO contract for the new year. We've removed several of the rarely-used databases and replaced them with EBSCO's Discovery Service (EDS). EDS will aggregate all of a library's EBSCO content (plus a few other electronic resources) into a single search interface available on the library website. A recent upgrade to Pinnacle's integrated library system will also potentially allow this content to be visible within the catalog.
- Work continues on the SimplyE test project. RBdigital content has been ingested onto the platform and is working correctly. The iOS app is available, and an Android app will be available soon. Once that's ready, we'll open it up to about a dozen interested testers from our libraries who will give it a thorough review.
- Pinnacle's Governing Board has passed the budget for FY 2020, formally adopted a FOIA policy, designated Matt Hammermeister as OMA Officer and FOIA Officer, added specific public comment rules to its bylaws, and drafted an intergovernmental agreement between the cooperative and one of its libraries for automated library computer services.

## PrairieCat

- The eight former NIC libraries went live on PrairieCat for circulation on May 22, 2019. So far, so good. Staff at both PrairieCat and the libraries continue with cleanup issues, but otherwise the project is finished, and we are on to the next chapter. Thanks to the addition of these collections, PrairieCat grew by approximately 235,000 unique new bibliographic records and 927,000 new items. The eight libraries are:
  - Cherry Valley Public Library District
  - Harvard Diggins Library (Harvard)
  - Ida Public Library (Belvidere)

- Nippersink Public Library District (Richmond)
- North Suburban Library District (Loves Park and Roscoe)
- Rockford University
- Talcott Free Library District (Rockton)
- Woodstock Public Library
- PrairieCat has issued an RFP for a mobile app and is currently analyzing responses. This purchase will be the first of our opt-in services that we will bring to membership. Not all members are interested, but we would like to leverage our size to get favorable pricing for those who are.
- Our second annual Resource Sharing Summit will take place on July 26. The summit will again be held at DeKalb Public Library. This year, the topics will be the assessment and restructuring of training in PrairieCat and refining/clarifying the mission and goals of our Resource Sharing Committee. The summit will again be facilitated by Amanda Standerfer.
- Planning continues for the annual PUG (PrairieCat Users Group) Day conference, to be held at NIU Rockford on Sept. 20, 2019. Look for more information coming soon.

## Resource Sharing Alliance NFP (RSA-NFP)

- RSA continues to work with three libraries that are in the process of joining RSA.
  - Flanagan Public Library District finished cataloging and has started cleaning up their cataloged items to remove random item types, locations, genres, etc. to make their collection cohesive.
  - Ransom Memorial Public Library in Altona is cataloging.
  - Williamsfield Public Library District is cataloging.
  - Astoria Public Library District was accepted as a new RSA member, received a RAILS catalog grant, and will begin cataloging this fall.
- RSA currently has three open staff positions, two of which are new positions. The new positions are for another Cataloging and Database Coordinator and for a Member Services User Experience Coordinator, which is a new area of responsibility for RSA. Wendy Adams-Good has moved to Georgia, so we're also looking to fill her Member Services Coordinator position.
- The addition of two staff members requires us to rework our existing office space to accommodate them. We have converted a small conference room into an office, created a new medium-sized conference room that will fit the entire RSA staff at a meeting, and are moving all RSA staff members to different offices, with more staff sharing office space.
- We are in the final stage of testing prior to rolling out our new BLUEcloud Mobile app. That should be released in July. We are configuring and, in conjunction with Quincy Public Library, starting to work with SirsiDynix on a pilot of its new BLUEcloud Acquisitions product. We also continue to rework most of our existing policies to better document long-standing common understandings that have become problematic as longtime library leadership retires.
- Finally our strategic planning process is in full swing. On August 1, we'll have a Membership Planning Retreat to work through what we've learned so far with an eye to setting the direction for RSA's future. We hope to complete the strategic plan by our November board meeting. Then we'll likely start phase two to finalize a new multitiered membership structure and accompanying fee structure.

## Rock River Library Consortium (RRLC)

- We have been busy working with Rock Falls Elementary School District #13 and Milledgeville Public Library, both of which were awarded RAILS grants to join RRLC. The established timeline has them migrating to TLC the end of July with go-live on August 1. They will not be turned on for lending and receiving requests for at least two months as they get familiar with the system. Training for the schools will begin the first week in August on changing barcodes on materials from an 8-digit barcode to a 13-digit barcode. At Milledgeville Public Library, they will learn how to add patrons, change barcode numbers on materials, and add new materials to the system.

- Contracts will be going to RRLC members after being updated to include the new members and to reflect the change from an in-house server to a cloud based server.

## System Wide Automated Network (SWAN)

- Automated Delivery Label Now Live
  - SWAN has developed a web application to generate a RAILS delivery label. This web application utilizes the SirsiDynix Web Services API. There are now 20 libraries using this automated label in conjunction with restick label printers. See <https://support.swanlibraries.net/help/transit-label-generator>.
  - The next release of the in-transit label generator will include the feature to generate a label for SWAN libraries to label material to non-SWAN libraries.
  - SirsiDynix libraries interested in this web application can reach out to us to learn more about deploying this for their own library or consortium. RAILS specifications for ILS-generated delivery labels are available at <https://www.railslibraries.info/services/deliverylabels>.
- Patron Database Maintenance
  - SWAN has removed thousands of user records and institutional accounts that were no longer in use or were duplicative in some aspect. This cleanup included normalizing the user record data entry. Much of this cleanup was required after the 19 libraries joined SWAN. The institutional record cleanup (e.g. SHARE Illinois records) has aided our in-transit automated delivery label development.
- SWAN Expo 2019 Registration Open for All RAILS Libraries
  - The annual SWAN Expo will be held Friday, August 16, 2019. The sessions and registration for the event are open to all libraries and can be found at <https://support.swanlibraries.net/meetings-trainings/annual-conference>.
- OPAC Improvements
  - The Enterprise 5.0.1 version with responsive design (aka mobile-friendly pages) was released by SirsiDynix. We will be testing this version within our cloned environment of the Enterprise catalog. This release has been long in the making. No date is set yet for our final upgrade.
- Mobile App for All SWAN Libraries
  - SWAN is providing a mobile app to all libraries as part of the current and FY 2020 budget. The mobile application will be a single download that will change the context of the app and content to the home library once the library user logs on. The SWAN release is expected in July and will integrate within mobile devices each library's collection of e-books, e-audio, and e-streaming content.
- Usability Study
  - The SWAN User Experience Team completed its biannual usability study with library patrons. This test focused on the interface for Article Search, which utilized EBSCO Discovery Service (EDS), Enterprise, and OpenAthens. The study compared SWAN's Article Search against Chicago Public Library's BiblioCommons integration with online resources. Alternate interfaces were tested within Enterprise. Recommendations include various user interface changes and provide some future direction for Article Search in marketing to segments of library users. You can read the detailed study, along with prior studies, at <https://support.swanlibraries.net/documentation/64810>.
- SWAN's Legal Entity and Governance
  - The strategic plan specifies that SWAN will review its governance structure and provide recommended changes. The SWAN Board has received two legal opinions on the ramifications for SWAN governance and anticipated impact on the organization should SWAN convert to a 501(c)3.