Consortial Reports

CARLI/I-Share

- Despite the COVID-related closures and shift to working from home, the project to move to Alma and Primo VE is continuing as scheduled at this time and we are still looking at June 24 for our Go Live date.
  - The list of events and deadlines related to the project can be found in multiple formats on the CARLI website: as calendar items, as a printable pdf, and as an Excel sheet that you can use to include any of your own tasks and dates.
  - April 1 marks some major deadlines. By April 1, libraries must submit the I-Share Alma Migration Form Online Update Survey to indicate any changes for your production Migration Form. We have attempted to keep this task as simple as possible, and to allow for the default response to be "no changes" from the form your library submitted for the test phase. We are also now reaching dates for beginning to stop changes in Voyager. As of April 1, library staff must stop adding new locations and vendors to Voyager and library staff must stop adding new libraries, locations, vendors to Alma test environments.
- April 30 will be the last day to perform technical services work (acquisitions, cataloging, serials) in Voyager.
  - As of May 1, we will enter the "Technical Freeze". During this period we must all stop making changes to inventory (bibs, MFHDs, items) in Voyager.
  - Circulation activity can continue through June 18. Universal Borrowing was scheduled to stop on June 11, but has already been suspended in response to COVID closures, and it is questionable as to whether it will resume before its scheduled shutoff date.
- A migration of this scope is stressful, even in normal times. While our consortium size adds to the complexity, it also works for our advantage in many ways.
  - Because of our size and geographic distribution, we knew from the outset that most of our instruction and consultation would have to be delivered remotely and not in person.
  - Our weekly Office Hours webinars have been recorded and made available on our website. Along with Ex Libris' Knowledge Center you should have access to a wide range of Alma and Primo VE training and planning materials from wherever you are working.

Cooperative Computer Services (CCS)

- Palatine and Grayslake onboarding: As of 4/8/20 we are still on schedule for a Labor Day week go live.
- Ccslib.org/learning.ccslib.org merge and redesign: We moved this project up while patron UX testing is on hold. We're working with library staff remotely to gather feedback on site use and need. We may reach out to other consortia for website access if a competitive analysis seems like it would be helpful (having testers do the same task on multiple sites).
- Onboarding/Training Kits by department and task are underway. Two kits have been published with a schedule and plan for the remaining kits. Kits include videos, documentation, exercises, and a quiz.
- Worked with library staff advisory groups to set standards for hold slips with regard to patron privacy.
- Updated our test instance of Polaris to 6.5
- Staff attended Design for Digital and PLA, as well as several online CE events.

Pinnacle Library Cooperative (PLC)

- All six Pinnacle libraries are closed until further notice. Many library staff are continuing to work remotely, but no patron interaction, like curbside delivery or drive-thru service, is taking place. Pinnacle staff is also working remotely.
- During the closure, Pinnacle will be presenting 4 virtual workshops for member libraries on the web-based ILS products. Registration for these sessions has been very strong.
- The Governing Board recently approved the purchase of an online book club module through LibraryIdeas. LibraryIdeas hosts the platform, provides simultaneous access to the title, and moderates the discussion for 5 books per year. We're planning on launching the first title before the end of April.
- The Pinnacle GB will be meeting on April 22 to approve the FY21 budget. Priorities in this year's budget include increasing the amount spent on OverDrive eContent and hiring an additional part-time staff member

PrairieCat

- Aside from daily meetings to try to keep up with this changing environment and prepare for when we return to our offices, PrairieCat has continued to work on our training initiatives.
  - On April 1, we launched our new online "Item Entry Certification" classes on TalentLMS. This process replaces the Barcode Test, which had been in place for a good many years.
  - All PrairieCat libraries are required to have at least one person that is certified to attach items to bib records properly. This process consists of a series of online classes and quizzes that will reinforce this process. Of course, on-demand, in person training is also always available.
  - We are moving much of our training to our Learning Management System to make it easier and quicker for our members to get the training they need when they need it.
- In addition, PrairieCat continues to work on configurations for our Capira Mobile App. Given the current situation, we are not sure of the timeline for launch, however we have completed a good deal of the initial design and are now gathering information from participating libraries for the final configurations.
- PrairieCat currently has two staff openings: the Training and Outreach Coordinator and Senior Systems Specialist. We are currently interviewing candidates online, and will be having in-person interviews when we return to the office.
- PUG Day planning continues. PUG Day this year will be held on August 28 at Waubaunsee Community College in Sugar Grove. Last year, we had about 325 people in attendance, and hope to match or beat that for this year.

Resource Sharing Alliance NFP (RSA-NFP)

- RSA continues to work with the following new libraries who are in the process of cataloging their collections in RSA:
  - Ransom Memorial Library is working on final catalog cleanup tasks. They are entering patrons into the system.
  - Williamsfield Public Library is awaiting a final cataloging cleanup visit. The current situation and subsequent library closures push everything back.
  - Astoria Public Library has started cataloging their collection into RSA's database.
- Staffing Update: RSA will be filling three new positions in June/July, assuming the COVID-19 situation allows. Be in the lookout for advertisements for a Design, Marketing, and Administrative Coordinator, a Cataloging and Database Training Coordinator, and an Operations Supervisor position to be posted on the RAILS job board.

- Working from home: One upside of the current situation is that we're getting a real-life look at how working at home would work for our staff. Jabber and Zoom have been very helpful. While I don't anticipate and RSA staff working from home full-time, at least we know we can make it work for short term issues or in an emergency.
    - My take away is that if we switched to full-time work-at-home, we'd also need to move to Microsoft Office 365 so eliminate VPN access requirements to shared network drives and allow collaboration for shared documents. RSA needs a VPN for the ILS and another VPN connection for RAILS shared drive access. We are temporally working around the need for RSA system VPNs with some firewall magic, but that is a short-term fix.
- Tech Updates: RSA's Strategic Planning Process pushed our technology updates back a few quarters. We have intended to use the Jan – May time frame to update most of our system and hardware.
    - We upgraded our Symphony ILS, purchased a new firewall, and started the laborious process of verifying all our member library static IP addresses to ensure the new firewall contained only currently active IPs for our libraries.
    - We use library IP addresses to limit access to the system. With everybody working from home, this process will have to be restarted once the libraries can work in their buildings again. We also updated a few behind the scenes products and had plans to update additional things before the work at home order.
- Automation System news: We have improved our processes around library closings, extending due dates, modifying outstanding holds, mass closure date updates and more.
    - The RSA staff worked tirelessly to ensure we helped the libraries cause the least amount of disruption to their patrons.
    - Our school library patrons have had their fine blocking limits effectively removed to allow everyone access to online tools even if they have a lost item.
    - We continue to extend due dates for all checked out items, now out to 10 May, to ensure patrons aren't charged over or lost bills for items they can't return.
    - Once we have a reopen date, we'll reverse all the closures and ramp up holds filling.

Rock River Library Consortium (RRLC)

- The shelter in place order has brought about many changes to the library and our consortium members. Currently, we are still working with Find More Illinois and the Library Corporation to work out the issues of NCIP. This has been a very hard avenue to navigate.
- In the coming weeks, The Library Corporation will be demonstrating to our group of cataloguers the newest version of their product, web-based cataloguing. Currently our libraries use remote desktop to access cataloguing.
- We are looking into an RFP for authority control and database clean up.

System Wide Automated Network (SWAN)

- SWAN staff shifted to 100% working from home on Friday, March 13th with a stated end date of May 1, 2020. However, we can work indefinitely within this arrangement.
    - All membership meetings and training events were switched to online hosted events (updated in L2).
    - Weekly membership "fireside chats" are hosted by SWAN weekly on Tuesdays at 11 a.m. Attendance at these events has been 150 online attendees on average.
    - Annual SWAN Expo held in August was canceled and converted to a weekly series of online sessions with member libraries and selected service providers.
    - We continue to adjust the due date of all checked out items via a nightly script.
    - Patrons are still able to place holds on physical collections and hold queues remain active.

- o The SWAN support site has a COVID-19 page that is designed to aggregate the membership updates: https://support.swanlibraries.net/covid-19

- **Patron Help Site**
    - o The www.swanlibraries.net site was converted to a patron help site in early February. This site is linked to from the public catalog. The purpose of this site is that many features and tools SWAN has created for the 1.8 million population SWAN serves were spread across multiple platform interfaces.

- **SWAN E-Card Registration**
    - In March 2020, SWAN launched an in-house developed, opt-in tool to handle patron registration inquiries for SWAN libraries. The tool, Online Patron Registration is hosted on the new patron help site and is linked to from a library website and/or the library's Enterprise catalog profile and provides the prospective patron a quick and simple method of signing up for a library card. While the initial library card issued is temporary, it can be used for immediate access to online materials and can be verified by the library for conversion to a full access card at a later date. It can also remain as an online-only card with an extended expiration following library verification.
    - The e-card registration debuted on March 23rd and the first week saw 529 patron accounts created.

- **E-Content Initiative**
    - SWAN is well-positioned for e-content needs for member libraries closed during the regional shelter-in-place directive. We have a dedicated Electronic Resource Sharing Consultant on staff, Robin Hofstetter, who is navigating the shifting environment for our libraries.
    - SWAN offers all member libraries at no additional cost discovery connectors for vendors including: Hoopla, OneClickdigital, OverDrive, Bilblioboard, B&T Axis 360, Cloud Library, Freegal
    - Additionally, SWAN's Article Search platform combines the EBSCO Discovery Service, Enterprise, and OpenAthens into a single search research tool for library users. There are plans to utilize this as homework help tools for targeted K-12 home learning.**EBSCO Group-Purchase**

- **EBSCO Group Purchase**
    - The SWAN membership approved a group-purchase coordinated with RAILS for the EBSCO "Package B" for all public libraries within the consortium.
    - All 92 public libraries are required to participate
    - Total cost is $420,000 which is 50% less than a total RAILS Package B price
    - Pricing is based on four discount tiers for libraries
    - SWAN will hold the 1-year license starting July 1, 2020
    - Libraries get 14 databases within the package and a selection of 4 additional databases among another 18
    - This effort took around 12 months of research and effort by Robin Hofstetter at SWAN. Leila Heath at RAILS worked with EBSCO to negotiate a SWAN price.