

# Consortial Reports

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## CARLI/I-Share

- On the completion of the production data loads and libraries' acceptance of their data, the 89 I-Share libraries went live on Alma and Primo VE on June 24 as scheduled. On September 1, 2020, Ex Libris transitioned our project from implementation to "support". This means that we are no longer working with a dedicated Ex Libris implementation team and are now working through their standard customer support channels.
- In August, we transitioned from having 5 generic "sandbox" (test) environments to having copies of 5 I-Share libraries' institution zones as "premium sandboxes". The five institutions represented are UIU, UIC, SIC, RMC, and MMC. All five sandboxes were fully anonymized by Ex Libris to protect patron privacy and institutional fiscal records. RMC and MMC (Robert Morris Univ. and MacMurray College) both closed between the beginning of the project and go-live, but we are able to keep their institution zones for use as generic testing and training IZs. As this report is being prepared, CARLI has just successfully negotiated for a sixth premium sandbox at no extra charge; its contents are still to be determined.
- The I-Share libraries have been opting to begin using Alma's resource sharing service, AFN-Automated Fulfillment Network, on their own schedule. As of this report, 75 of the I-Share libraries are providing at least some AFN service.
- Circulation activity continued in Voyager until June 19 but most I-Share libraries remained closed due to COVID. A few I-Share libraries supported some local requesting (remote request by their own patrons) during the closures.
- We had planned to keep Voyager's Universal Borrowing operating until June 11, but it was turned off on March 16 due to the COVID closures including the suspension of ILDS service, and it was not restarted.
- CARLI staff have continued to work with institutions that want to use the process of synchronizing user information between campus student information systems and Alma. This process is referred to as "SIS" (student information systems). As of this report SIS setup work is complete for at least 62 I-Share institutions. Institutions set their own frequency for these updates. As our membership includes some special libraries without campus IT shops, we do not expect to ever have all I-Share libraries using the SIS process.
- CARLI staff have continued working with library staff, the EBSCO OpenAthens project team and campus IT staff on getting authentication setup for the I-Share libraries. At this writing, over 60 I-Share institutions completely set up OpenAthens for Alma and Primo VE single sign-on. Work is in process at EBSCO on "Phase 2" of the OpenAthens project which will support e-resource authentication. EBSCO has had some issues that have slowed down this setup work and it is expected to continue into early 2021.
- In response to requests from many I-Share library directors, CARLI staff will again be doing a bulk extension of due dates to prevent patrons from being penalized for unreturned items

during the time when many students have not returned to campus due to COVID changes. The CARLI Board has approved extending due dates to February 1, 2021, with libraries having the option to opt out for local circulation. All I-Share resource sharing loans will get the February 1 due date until further notice.

- CARLI has continued to hold open “office hours” calls to discuss Alma and Primo VE topics and take questions about the products and the migration process. We have moved to an every-other week schedule as of September. These are held on Thursday afternoons at 2pm and recordings of the sessions are made available on the CARLI website. These calls have been very well attended, often still attracting over 130 participants.
- CARLI plans to decommission Voyager and SFX on October 30, 2020. No further access via web interfaces, Voyager clients, or reporting will be available after this date. We are aware that some institutions are still relying on Voyager for SIP2 access for Axis 360 and Overdrive authentication. We are working with those institutions and vendors to find an alternative solution as SIP2 is not secure enough for sending personally identifiable information. We may keep the Voyager SIP2 port open after October 30 if an alternative solution is not yet in place.

## Cooperative Computer Services (CCS)

### CCS New Members

CCS's newest members are live on Polaris. Grayslake and Palatine went live over Labor Day weekend. We had two new components to this project: online training and automated patron deduplication.

Due to the COVID-19 concerns, we did not hold any in-person training for Grayslake and Palatine. Staff used the resources at [training.ccslib.org](http://training.ccslib.org) for self-paced learning. We supplemented their individual learning with weekly office hours for public services and technical services as well as select live webinars and demos.

Systems Administrator Bob Barth worked with Member Services staff to develop patron matching criteria. During previously library adds, CCS staff manually deduplicated patrons the week of go live, resulting in close to 100 hours of staff time. Bob was able to match and merge most duplicates, flagging a small percentage for manual review. The process had to be run multiple times over the course of weeks because patrons with held holds, ILL requests, or in collection status cannot be merged.

### Strategic Planning

We have begun a new strategic planning process, which we hope to take to Governing Board for January or April approval. We are currently in the needs assessment phase.

### CCS Website

User Experience Specialist Kathleen Weiss is leading the redesign of the CCS website. She has completed a needs assessment including virtual user experience testing with library staff during the stay at home order and has developed an RFP which we hope to issue in the coming weeks.

## Salary Schedule Update

CCS admin is working with HR Source on salary benchmarking, with a planned presentation to Executive Committee in November.

## COVID-19

Almost all CCS libraries have resumed intra-CCS loan, though many are still only offering holds pickup service to local patrons due to limited space and appointment slots.

## Pinnacle Library Cooperative (PLC)

- Pinnacle's staffing has increased to two! Leah Dudak started on September 28 as a Member Services Librarian. The new position will be focusing on training staff and creating documentation for our member libraries.
- All six PLC libraries have reopened to the public with social distancing and appropriate safety protocols put into place. Additionally, all resource sharing and interlibrary loan activities have resumed throughout the consortium. On average, we are circulating approximately 70-75% of what we would normally be circulating at this time of the year. Pinnacle has created this [Google Data Studio project](#) to help member libraries track COVID-19's impact on various metrics.
- This summer, Joliet and Plainfield both voted to go fine free. That makes all six of our libraries either completely fine free or partially fine-free for Children's materials.

## PrairieCat

- PrairieCat continues to work with the Lostant Community Public Library to bring them on board as a Basic Online member. Lostant received a RAILS Catalog membership grant and is becoming automated for the first time.
- 39 PrairieCat libraries opted in to be the first to launch our new Capira mobile application. More members will be able to sign onto the project in the coming year. Several of our members have also launched the Capira curbside interface, which seems to be well received by patrons.
- PUG Day was moved online, and a series of webinars were held in August and September around various topics of interest to our membership. They were well-attended, and it is assumed that PUG Day will also be online for FY22, due to continued concerns around COVID-19.
- PrairieCat is again fully staffed. Elizabeth Smith, the former HR and Admin Assistant, has taken over the Training and Outreach Coordinator position. Chelsey DeSplinter has joined us as the new HR and Admin Assistant. Roy Arey has also joined the PrairieCat team as our new Senior Systems Specialist.
- PrairieCat Administration continues to work with RAILS and our legal team to investigate rejoining the IMRF pension plan. Progress has been slow but we are hopeful they are now giving us some attention.

- As the PrairieCat Strategic Plan expires in FY22, the process of evaluating and refreshing the plan is now underway for the next three years. PrairieCat has again engaged Amanda Standerfer to assist us in this undertaking.
- Work continues on our TalentLMS online training platform. Most of our training is now being delivered on this platform, and more content is being added constantly by PrairieCat staff.

## Resource Sharing Alliance NFP (RSA-NFP)

- Like all other consortia, RSA spent the better part of our spring and summer closing, then partially reopening, then fully reopening (in the system) our member libraries. We've gotten quick good at manipulating the database to renew items, extent holds, forgive fines, turn off picklists, etc.
- As part of the reopening process, many RSA libraries decided to go fine free. RSA currently has 22 Public and School libraries who are fine free. We have several other libraries exploring or moving towards becoming fine free.
- RSA staff completely reworked our billing and notice reports, touching and updating over 2,500 individual reports. This work will allow us to add new item types into the system without having to manually redo each of those reports. We've also touched base with our libraries to explain their notices and notice timing and changing settings for many libraries. This project has been on our to-do list for years.
- The Cataloging staff turned their complex, 8 hour, basic cataloging course into a 3 day, online in Zoom, course. They have tested it and run it twice. We are working to run these at least every other month from now on. We purchased 10 webcams to loan to those libraries who don't have them so we can see their faces during the training.
- RSA has converted many existing training classes or in-library trainings into either Zoom training or videos or both. This was a Strategic Plan item and the lack of travel and working from home forced our hand to do them sooner.
- Our new help desk is in the final phases of implementation. We're working on populating the data import sheets for libraries and staff. We are also doing acceptance testing on the Salesforce module layouts and trying to wrap our heads about the methodologies we will adopt. The new help desk will become our hive mind and we'll be routing as much library correspondence for issues or questions as humanly possible.
- RSA have made very limited visits to libraries new to RSA for Cataloging and Circulation training, and a few visits to schools or public libraries with massive staff turnover. Sometimes only an in-person visit will work for training.
- RSA has done an entire tech update on our automation system. We're now running the very latest versions of all our vendor's software.
- RSA's User Experience staff member has taken a job at a member library. If you'd like to work for RSA, check out the RAILS job board!

## Rock River Library Consortium (RRLC)

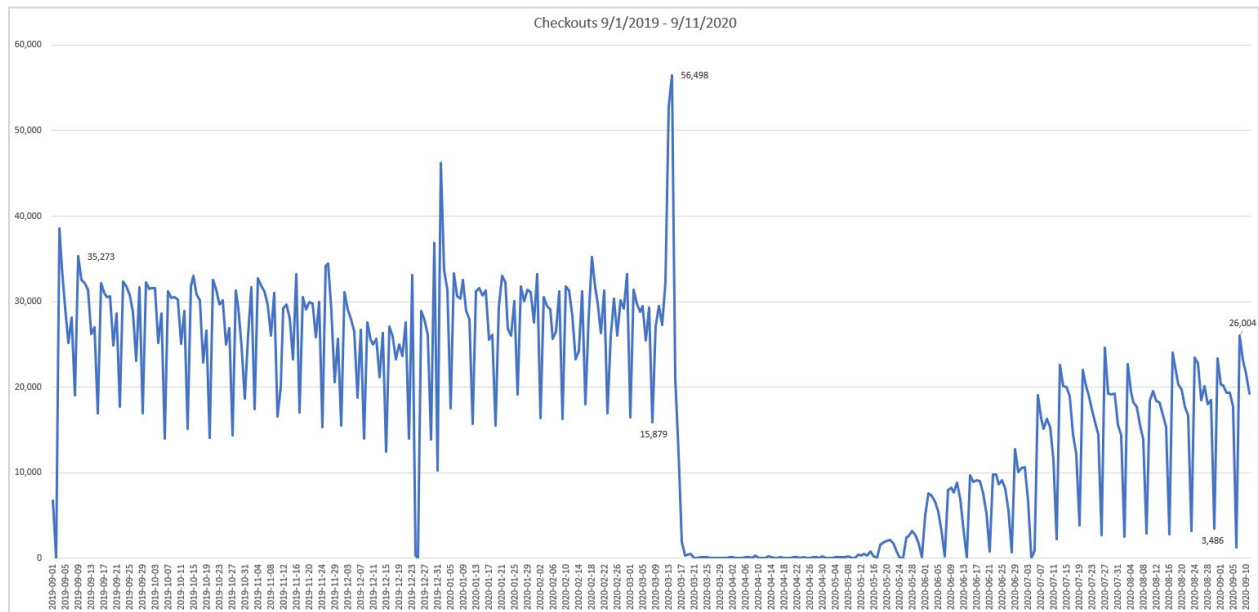
No report.

## System Wide Automated Network (SWAN)

### COVID-19 Response

- SWAN staff shifted to 100% working from home on Friday, March 13<sup>th</sup> with plans to remain working remotely indefinitely within this arrangement
- All membership meetings and training events were switched to online hosted events
- SWAN has hosted 18 membership “fireside chats” since the pandemic started in March. These meetings are recorded and posted on the SWAN Support site.
- 92 SWAN Libraries resumed resource sharing as of the end of September
- ~70 SWAN Libraries have building open to the public in some capacity
- 93 SWAN Libraries resumed delivery service

Daily high circulation checkout count in September 2020 is at 74% of compared to the same month last year. Weekend decreases in circulation are more dramatic, with low daily comparison of at 22% compared to pre-COVID lows. This illustrates a changed circulation pattern where weekend activity has not returned at the same rate – no doubt due to reduced weekend hours.



### Aspen Discovery Project

SWAN is piloting the Aspen Discovery website as a possible replacement of the current Enterprise OPAC. ByWater Solutions was contracted to install an instance of Aspen in SWAN’s cloud infrastructure and to sponsor development of e-content integration with EBSCO Discovery Service, Axis 360, and Freegal. The SWAN Aspen test instance now includes the consortia catalog as well as four individual library catalogs for Elmwood Park, Oak Park, St. Charles, and National University.

In the past month, there have been two major releases of Aspen, 20.11 and 20.12 which include many SWAN-requested features. These include:

- Integration of the EBSCO Discovery Service (EDS)
- Baker & Taylor Axis 360 integration
- Accessibility updates, many of which came straight from SWAN's accessibility audit
- "Theming" updates that give libraries more options to customize their catalogs, including an accessible color contrast checker
- Layout changes to the administration interface, which included SWAN requests for more robust permissions and better breadcrumbs
- Layout changes to navigation in the patron interface that improve the mobile experience and incorporate additional accessibility improvements

A comparative study of Aspen's search relevancy with completed with library staff, with Aspen receiving scores that indicate returned results are greatly improved in Aspen.

### OCCL Holdings Manager: OHM Project

We have successfully used OHM to process holdings updates for all of the participating Illinois LLSAPs. We have learned a lot from this process and debriefed with the members involved. We will continue to offer monthly updates indefinitely.

We are putting OHM on hold for a while to focus on more internal projects, but we do have development plans for the future. We will develop a user interface and statistics dashboard, and hopefully develop functionality to process MARC holdings records for better representation of serials on OCLC. We also may build a sister tool to perform MARC analysis and cleanup feedback using the MARC parser SWAN's Rudy Host developed for OHM.

### Baker & Taylor Rental Collection Project

Over the past month, SWAN has started a pilot of a SWAN-curated rental collection. Using a high demand holds report filtered to highlight collection needs of some of our smaller libraries, we placed a rental order with Baker & Taylor of about 30 books to float in the SWAN collection. These included multiple copies of bestsellers and popular items such as *Too Much and Never Enough* by Mary Trump and *Midnight Sun* by Stephenie Meyer.

The copies are currently fulfilling holds among the SWAN membership. They are holdable by anyone at any library and will fill holds from the top of the hold queue first. Once the holds queues for these items dwindle, they will naturally return to SWAN's Quail Ridge office to be either returned to Baker & Taylor or kept.

The first order was a small test run. We expect to be placing monthly orders for a greater number of materials for the duration of this pilot.

The pilot is also an opportunity for SWAN staff to get hands-on experience with BLUEcloud Acquisitions. We did not use the BLUEcloud Acquisitions for our first order, but future orders will be processed

through the tool, and we will also place small firm orders for select materials in order to test the new EDIFACT functionality that was released over the summer.

## SWAN100 Project

SWAN is in the process of adding three standalone libraries to the consortium—Glenside, Roselle, and Warrenville Public Library Districts. All test data has been loaded and libraries have reviewed for accuracy. Profiling is complete and policies have been loaded into production, so all SWAN libraries will be seeing the new library codes in the system – GSD (Glenside), ROD (Roselle), WVD (Warrenville).

Weekly training and office sessions are scheduled through January for these libraries. While these live sessions are reserved for our incoming libraries, sessions are recorded for all members. The SWAN Support page for the SWAN100 project lists these resources and recordings.

The migration timeline is on track. These milestones represent major work completed and impact for members.

- June 2, 2020 - SWAN members vote to approve new libraries
- August 5, 2020 - Policies loaded into Symphony
- August 28, 2020 - Test data loaded into test system
- September-November 2020 - Testing and training for new libraries
- November 23, 2020 - Technical Freeze for new libraries
- November 30-December 6, 2020 - Loading of catalog/item records into SWAN bibliographic database
- December 5-6, 2020 - Re-indexing of SWAN catalog (all libraries in offline mode)
- December 6, 2020 - Patron and circulation data load for new libraries
- December 7-8, 2020 - New libraries work in offline mode
- December 9, 2020 - Go-Live

## SWAN100 Migration Timeline

