

# Consortial Reports

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## CARLI/I-Share

- CARLI Annual Meeting scheduled for 11/4/2022, in person in Champaign, IL.
- CARLI has opened applications for new I-Share members, we expect to finalize applications for interested libraries for Board approval at the end of October.
- After retirements this past summer, two new staff started in August and we expect a third to start soon.
- We are working on updating our strategic priorities. Both a survey and Zoom sessions have been shared with the membership to get their input. We'll also have a discussion at our annual meeting.
- A second round of applications for the creation of Open Educational Resources (OER) as part of the Illinois SCOERs ([Support for Creation of Open Educational Resources](#)) program is available. This project has been fully funded by an additional \$1 million supplemental grant to the University of Illinois System/CARLI, from the Fund for the Improvement of Postsecondary Education (FIPSE) in the U.S. Department of Education.

## Cooperative Computer Services (CCS)

- Thank you to RAILS delivery staff for participating in a Q&A with CCS libraries (September 22)
- CCS Governing Board will meet in October. We expect:
  - Voting to accept Warren-Newport Public Library in October. We anticipate a September 2023 go live.
  - Discussion of Vega Discover and CCS's options regarding Vega.
- R. Fischer has been accepted into the RAILS EDI Cohort program that will begin in October.
- After a year of development, the CCS Diversity Audit Tool is now available to CCS member libraries. To access the tool, staff can log into Web Reports with their L2 account. The link to the tool can be found in Web Reports under the new "Diversity Audit Tool" category. The tool utilizes the subject headings in the bibliographic records of the CCS catalog to:
  - Provide librarians with an easy way to analyze the level of diversity of the topics included in their collections.
  - Identify diverse items that other libraries own that could be purchased by your library.
- Several libraries are working with CCS and NCOA this year. We continue to refine the process to make updates as easy as possible for our members.
- Two members have opted-in to the Cards for Kids expansion. CCS has statistical codes available for all members to track non-resident cards:
  - Non-resident fee cards
  - Non-resident fee waived – veteran
  - Non-resident fee waived – cards for kids
  - Non-resident fee waived

## Pinnacle Library Cooperative (PLC)

- On October 3, all six Pinnacle libraries launched Find More Illinois as an additional interlibrary loan option for our patrons. The SHAREit software, along with the NCIP integration into our ILS,

has relieved a good deal of the staff time normally required for facilitating out-of-system requests.

- The Pinnacle Governing Board has approved its first strategic plan and we're now beginning the process of implementing it. Our plan identifies four strategic directives for the next few years: increasing training opportunities for member libraries, sustaining operations through engagement and documentation, expanding communication with our members, and fostering resource sharing. In January, we will be hosting a meeting with the Governing Board, library administrators, Pinnacle staff, and committee chairs to plan further implementation.
- This fall, we plan to launch a new helpdesk system for our consortium using FreshDesk. The new help desk will include both a traditional ticketing system as well as a knowledgebase with answers to frequent questions related to the ILS ("how are fines calculated," "how do I do such-and-such thing," etc.). The platform will also include a "private" knowledgebase that will be used for documentation and succession planning purposes for Pinnacle staff.

## PrairieCat

- PrairieCat is currently preparing for the North Chicago Public Library go-live, planned for 10/26. North Chicago is joining PrairieCat as a fully participating library, and is migrating from a stand-alone TLC system. Mt. Carroll Public Library is also working on their upgrade from Union Listing membership to Basic Online circulating level.
- Vega Discovery implementation is proceeding. We are currently doing online training and creating/configuring the individual library sites for member staff to acclimate themselves with. We have set up a process whereby libraries can submit questions and feedback, and created a FAQ on the support site to provide answers to everyone. After a period of acclimation by the staff, we intend to allow libraries to share the link with their staff in a trial "try our new catalog!" basis. Some elements of eMaterial integration on consortia sites are still not released, so we will not be able to replace Encore until those processes are fully available.
- Our support website redesign is proceeding. We are beginning work on the forum and documentation portions of the redesign early in October.
- Migration to our Exchange 365 system, which is replacing our reliance on RAILS email, is underway. We are waiting for the go-live of North Chicago to finalize that with all staff. Member migration from our old Zimbra server to Exchange 365 will also occur shortly. Other aspects of our IT migration are also proceeding. We have ordered new laptops for staff and are preparing for replacement of our existing RAILS equipment in the coming months.

## Resource Sharing Alliance NFP (RSA-NFP)

- RSA's Board of Directors formed an Executive Committee on RSA Independence to formally manage and run the process of moving our support staff out of RAILS. We are moving forward with 3 major paths, 1) convert from a 501(c)(3) to an Illinois Intergovernmental Instrumentality, then pursue IMRF and LIMRiCC memberships to help retain current staff, 2) look into the possibility of some type of partial to full merger with another consortia, and 3) the fallback position of directly hiring staff in the current 501(c)(3) governance form, finding the best

insurance and retirement plans we can afford, and hope we can retain staffing. RSA is working with RAILS to find knowledgeable legal advice and a 3rd party facilitator to start intra-consortia talks.

- We've started bulk item conversions on a per-library basis as we move to new, standardized new materials item types. We've modified about 60% of the total number of new items over to the new standard by working with our largest libraries first. We expect the long tail of this project to run until the end of the year.
- On October 3rd, RSA will finally launch the new search tabs interface and integrated Open Access articles in RSAcat. Being large and complex means you find ALL the bugs and issues in various vendor products and services. The Open Access articles database is now over 47 million items and covers many popular journals. We're excited to roll this out to our patrons and students as it will be the only full-text database product many of our libraries and school can easily access.
- RSA's Member Services Supervisor is moving down south! We're in the process of reworking the position into, effectively, the RSA Assistant Director. This new position will remain the head of Member Services as well as taking on some additional administration and cross-department management work. Be on the lookout for the job posting later this year. This will be a good step on the ladder for anyone looking to be a consortia Director.

### Rock River Library Consortium (RRLC)

- The consortium started the new fiscal year off on a sad note. We had to drop St. Andrew's Grade School from the consortium because they no longer met RAILS membership requirements of a paid librarian. Our hope is they will find the funds next year to re-instate the individual and once again be part of the consortium. Until then they are not allowed access to materials from other libraries or the software.
- Press Reader for public libraries and Gale databases for schools were purchased for members using RAILS support grant funds. So far members are enjoying access to these new databases.
- Over the summer, Dillon Elementary, in Rock Falls, had their collection shipped over to the Sterling Public Library where volunteers weeded, changed barcodes from 6 digits to 13 digits, updated their MARC records in the database, genreficated the collection to make it easier for the part-time librarian to reshelve the material after the classes left, and relabeled. The collection went from 10,000 items down to 8,500 items. Most of the books were back on the shelves the first day of school, not bad considering the work began May 15<sup>th</sup> and completed September 7<sup>th</sup>.

### System Wide Automated Network (SWAN)

#### Enhanced Notifications with MessageBee

SWAN has brought forward a proposal to have all 100 libraries participate in the MessageBee service with Unique Management. SWAN libraries are already using MessageBee for voice notifications, SirsiDynix Twilio, and SendGrid for email notification. Our proposal will replace the existing email and

SMS notification with MessageBee. Each library would have customized and branded email notices. The approval of this additional service and expense will take place at the December SWAN Quarterly meeting.

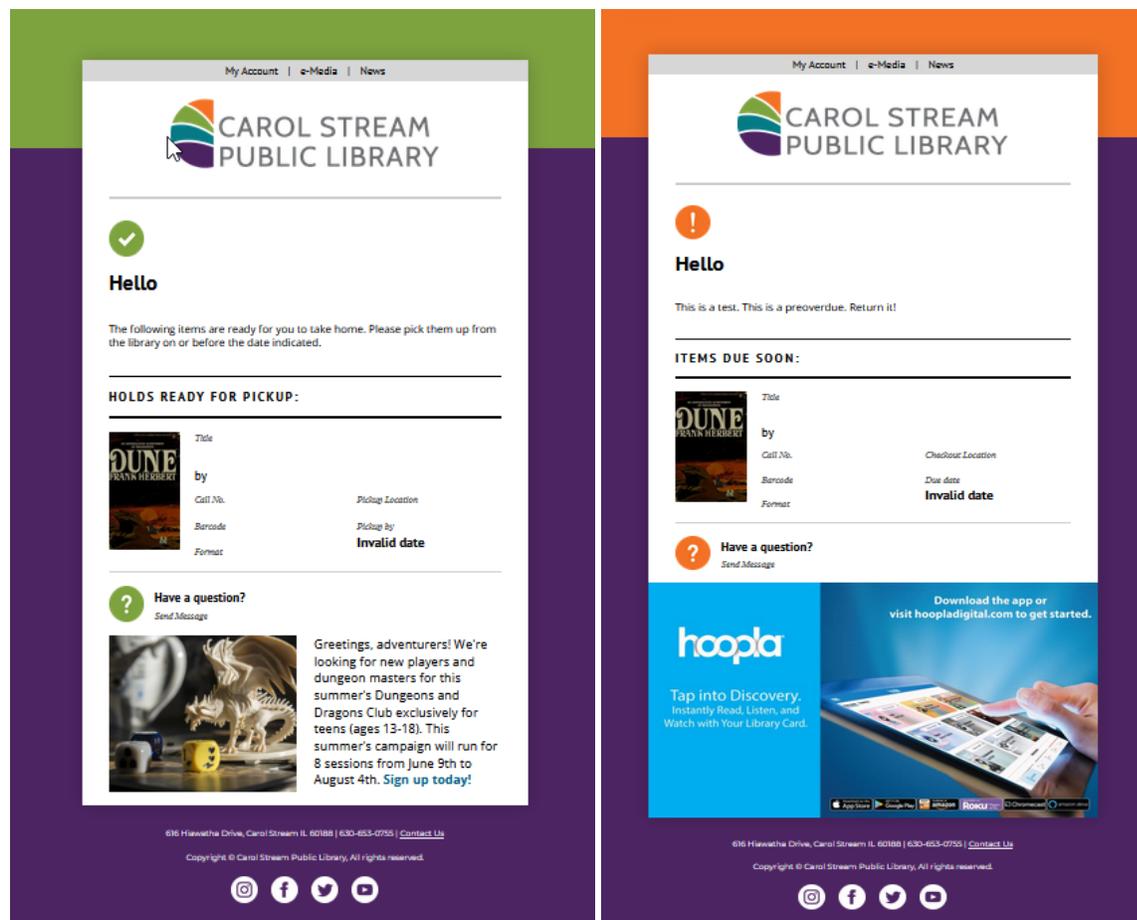


Figure 1 Examples of what MessageBee emails will look like for a member library

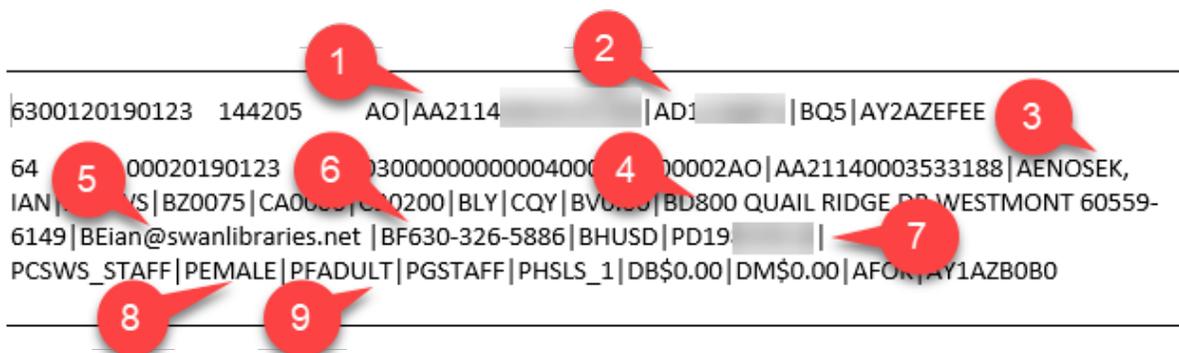
### Security Initiatives

The Information Technology and Systems Support team, in total, is reviewing the [NIST 800-171](#) standard in earnest. Work will focus on completing key plans such as the Incident Response Plan and Disaster Recovery Plan while working on technologies to harden our security.

### TLS-SIP2 Migration

SWAN IT & System Support staff is working with OverDrive to transition our OverDrive connections for authentication from unsecured SIP2 to TLS (Transport Layer Security) SIP2 which allows encrypting messages. This will encrypt patron information so that it is not sent in clear text across transport layers/networks. This work is scheduled to occur in early October where each of the three OverDrive consortium SWAN libraries participate in will be migrated individually.

This is a Wireshark capture of a patron using SIP2.



The personally identifiable information (PII) shared in plain text through a single SIP2 query includes:

1. User’s barcode
2. User’s PIN/password
3. User’s full name
4. Address
5. Email address
6. Phone number
7. Birthdate
8. Gender
9. Age category

Once the TLS SIP2 is implemented, the PII will no longer be exposed at the transport layer as it travels across the internet.

### Single Sign-On Pilot

SWAN has a goal to implement a single sign-on (SSO) solution to integrate our web-based applications within a framework based on SAML. This single sign-on will bring our Support website, Community Forums, Learning Management System, and the next generation web application BLUEcloud Staff.

Our Single Sign-On solution KeyCloak has been expanded to SWAN staff accounts when connecting to BLUEcloud Central applications. Currently the BLUEcloud interface support single sign-on but is not sending a sign-off communication. In a multi-staff work environment where staff change responsibilities throughout the day, this is a requirement before we can deploy the solution. SirsiDynix knows our priority and has this on their roadmap. Realistically we cannot expect to see progress on this from SirsiDynix until early 2023.

In the meantime, we are researching and testing use of KeyCloak with other SWAN services. We have tested the SWAN Community Forums ([Discourse](#)) using KeyCloak.

### SOPPA - Student Online Personal Protection Act

Effective July 1, 2021, school districts were required by the Student Online Personal Protection Act (SOPPA) to provide additional guarantees that student data is protected when collected by educational technology companies, and that data is used for beneficial purposes only ([105 ILCS 85](#)).

SOPPA applies to all Illinois school districts, the Illinois State Board of Education, and operators of online services and applications. It is the responsibility of the school district sharing information with an outside organization, including SWAN and any SWAN library member, to enter into a written agreement with the service provider collecting that information.

Working with our SWAN library member, Bensenville School District #2, SWAN has entered into an IL-NDPA (Illinois - National Data Privacy Agreement) with Bensenville School District #2. This agreement is a master agreement with BSD#2 which other school districts may "piggy-back" on this original agreement. This basically means that the paperwork is on record and filed with the national registry of privacy agreements. Any school/school district providing information to a SWAN library must also have an agreement in place. This requires minimal coordination since the IL-NDPA between Bensenville School District #2 and SWAN is already in place. All SWAN member libraries are listed in this agreement as trusted partners with access to the information contained in our shared patron database.

### *SOPPA Compliance*

Websites, online services, and mobile apps that are designed, marketed, and used for K-12 school purposes must comply with SOPPA regardless of whether they have a contract with a school or district.

SWAN is SOPPA compliant based on the following:

- Not using collected data to provide targeted ads;
- Not profiling students except in furtherance of school purposes;
- Not selling or renting student information;
- Not disclosing information unless required to by law or as part of the maintenance and development of services;
- Using sound security practices;
- Deleting student data when requested by the school or district;
- Publicly disclosing information about its use, terms of service, agreement, and privacy policy;
- Entered into a written agreement with the school district.

### *Changing practice to protect student privacy*

The best way to protect student privacy is to store minimal demographic and personal information on students. SWAN will be working toward more anonymized data practices to enhance our commitment to student privacy.