

Consortial Reports

CARLI/I-Share

- No report

Cooperative Computer Services (CCS)

New and Potential Members

Warren-Newport

CCS is onboarding Warren-Newport. In order to drive down rising service costs, CCS staff have taken on ILS configuration previously included in migration services. Bob Barth developed a script to populate database tables based on profiling documents, work that III bills 50+ hours for with each library add. Building test branches, developing the script, and testing the process and results took less than 35 hours of combined staff time. Training data load will be complete by the end of April. CCS will provide a mix of in-person and online training for Warren-Newport.

Mount Prospect

Mount Prospect Public Library was approved as a new member, effective November 2023. This approval allows both Mount Prospect and CCS to plan project workloads for a planned go live of October 2024.

Other

R. Malinowski met with staff from the Waukegan Public Library to discuss CCS membership on February 8, 2023. R. Barth and R. Fischer completed a report to compare Waukegan holdings to CCS member library holdings.

Office Move

CCS has selected a suite in 100 Tri-State International and anticipates a June 2023 move-in date. The new space is significantly smaller than our current office suite but also has access to three shared meeting spaces in the building. Renovations to the space are underway, as is liquidation of excess furniture and equipment. Furniture will be listed on the RAILS for sale/for free board as it is available.

EPAY Setup & Update

CCS has dropped the requirement that all libraries use Comprise for patron-initiated online payments. This is due to rising merchant processor costs and an integration with ePay that was not available when we first went live (thanks, Pinnacle and SHARE for pushing for this integration!).

CCS also has an ePay account and will collect payments from non-CCS patrons due to the configuration of the integration. After reviewing payments received over the past years and the number of libraries that may be involved in a transaction, it was agreed that any funds received would stay in the development fund rather than be credited to libraries. This change does require that CCS complete annual PCI Compliance SAQ A which will be new for us. ePay is now live at 11 libraries and CCS.

Innovative Updates

Polaris Server Migration

Innovative required that CCS Polaris servers be migrated to a new environment.

- Training server migration: Tuesday, March 7
- Production server migration: Saturday, April 8 (evening) through Sunday, April 9 (evening).

ILL has completed many migrations over the past three years and CCS learned from other customers what potential issues we may encounter and worked with ILL to mitigate them. We are hopeful that the process will be smooth for our members and patrons.

Polaris Email Notices

Most libraries have provided an updated email address to be used for Polaris email and text notices. CCS staff have been assisting libraries with the transition, with no major issues reported to date. As part of the change, libraries have begun monitoring failed notices and updating patron accounts with invalid emails. These changes will help reduce the likelihood that Polaris notice emails will be blocked or blacklisted by email and text providers.

2023 Fine Waive

Innovative completed the annual waive of fees 7 years or older on February 28. This allows us to better maintain the patron database by removing inactive cards.

Other Projects

Diversity Audit Tool

R. Barth added the new circulation statistics to the development version of the Diversity Audit Tool. R. Fischer created a survey to gather information on which statistics library staff are currently using. The survey was sent to staff who used the tool in the last 6 months.

OCLC Alternatives Investigation

R. Fischer is investigating alternatives to OCLC and potential implications, with support from D. Wischmeyer, M. Landers, and R. Malinowski. Research includes OCLC, SkyRiver, BTCat, and Find More Illinois. This project stemmed from upcoming changes to Leap and potential for streamlined workflows for technical services and acquisitions staff. After an initial report is developed discussing viability of the options, CCS will bring potential paths forward to governance for review and direction.

Technical Services Workflow Analysis

New features being developed for Leap include a direct integration with Baker and Taylor that could streamline acquisitions workflows. R. Fischer is tracking the development of these tools and will develop a report of her findings.

Circulation Report Guidelines

M. Landers is developing a set of guidelines for the frequency and use of circulation department reports with support from the Circ/ILL Advisory group and K. Weiss. The document, when complete, will help staff set internal workflows and optimize use of available reports.

Staff Learning

R. Malinowski and D. Wischmeyer will attend [Alliance for Library Impact miniconference](#) in June

Staff will also be attending IUG, WILIUG and ALA and Library Journal Project management course.

Pinnacle Library Cooperative (PLC)

- In September, all six Pinnacle libraries joined Find More Illinois. From October through March, our libraries have borrowed 434 items from the system and loaned 879 items to other participants.
- Working with Effectv and Comcast, our libraries' marketing staff ("PinMark") designed a 30-second television advertisement that encouraged viewers to download the Libby app and get started checking out eResources from the library. The commercial aired almost 3,000 times in our service area on cable news networks during election season, on popular made-for-tv movie channels during the holidays and on sports networks during College Football bowl games. We're considering pursuing additional advertisement opportunities in the near future.
- In January, the Pinnacle Governing Board gathered all library Directors, Assistant Directors, Pinnacle staff, and Pinnacle committee chairs for a special strategic plan meeting. At this meeting, we reviewed our new strategic plan and created a list of 20+ action items for the cooperative to focus on over the next several years. The meeting was a great opportunity for stakeholders outside of board members to provide input on the future direction of the consortium. We're looking to host a meeting like this at least annually.
- This Spring, we will be transferring our text-message notices to Unique's MessageBee product. We had already been using Unique for phone notifications, and are now adding text messages, as the ILS' preferred method is becoming increasingly unreliable. We will likely launch sometime in April/May.

PrairieCat

- PrairieCat is happy to say that Lostant community Library came live on the system on March 15th. This project has been a long one given the timing with COVID and staff challenges at the library, but they are now up and circulating to their patrons on PrairieCat.
- We continue to work with Mt. Carroll Public Library on their upgrade from Union Listing membership to circulating level. Progress has been stalled by construction work at the library, however we are hopeful that these issues will be worked out this month.
- We will be attending the April 20th board meeting of Winnebago Public Library. They have again expressed interest in PrairieCat membership, and we hope that their board will vote to join.
- We continue to work on configuration and rollout of Innovative's new Vega Discovery software. Currently, we are working on Overdrive and eRead Illinois integration. There is still a lot to be done, but we are working closely with their development and implementation teams and feel like we are moving forward. We also continue to be a development partner for the Vega Promote outreach and marketing software platform.
- PrairieCat is also in the final development stages for our new website, which should be coming online to the membership and public in May. We are working with The Cherry Hill Company to upgrade to the newest version of Drupal and completely redesign the site.

- We are also nearing completion of our IT migration from the RAILS infrastructure. We are currently operational on our own OneDrive, SharePoint, Zoom accounts, and other ancillary tools. We will be migrating to our own laptop and equipment within the next two weeks. At that point, only our virtual host (hosting our firewall and a few small servers) and phone dialer will be left on the RAILS infrastructure. We will address those at a later date. We really appreciate all the help that RAILS IT has been during this process, and we want to thank Anne, Wesley, and all the IT staff for their help and support over the years.

Resource Sharing Alliance NFP (RSA-NFP)

- RSA Independence Project: The Executive Committee has explored and eliminated all but one option for RSA's post-RAILS future. RSA has retained legal representation familiar with the conversion process and will transition to an Illinois Intergovernmental Instrumentality. We're also starting work with IMRF about joining once we've transitioned to an Ill. Conversion requires new Bylaws, new committee and group structures able to deal with Open Meetings Act quorum requirements, and new agreements between the member libraries and RSA. Once the conversion work slows down, we'll transition to fleshing out the remaining benefits package, reworking job descriptions, finding HR and payroll partners, and all the other things required to directly hire staff.
- RSA finished the rollout of standardized new material item types system wide. As the first system-wide standardization project, we expected it to take much longer to finish. In the end, we completed the project in about 1/3 the expected time. Libraries report that holds are flowing as expected for the new item types. RSA moved to specific system-wide holdable and local holds only item types for about 95% of our new materials. This has resulted in improved clarity of who sends what to whom and less confusion about holds on new materials overall.
- RSA started a review of our entire patron database looking to review, revise, and re-implement all the various patron policies we have. In addition, we'll do duplicate patron remediation, ensure all patrons meet our entry standards, long-expired patrons are cleaned up and more.
- The cataloging backlog from our old pre-brief record creation is almost complete. We expect to be finished with all of those requests by the end of April. We are now moving on to upgrading the brief records our libraries started creating as of July 2022. The cataloging staff has made great progress in catching up from various staffing shortages and the pandemic and are happy to be moving on from the backlog.
- The departure of our Member Services Supervisor allowed RSA to rework that position into the Operations Manager, effectively RSA's Assistant Director. We have just hired a person from outside RSA to assume this new role. We expect them to start in late spring. We are looking forward to their new perspective on RSA's operation and culture and they will be deeply involved in our independence Project as well.
- We held RSA Day in person for the second year in a row in March. We had 150 library staff members in attendance, up about 20% from last year. This event is focused more on non-RSA specific topics and included a keynote address on 'Coping with Compassion Fatigue'. The event went well and the focus on topics not specifically related to RSA services was well received.

Several staff members asked if other consortia provide learning days for their members and if so, why don't the consortia work together to create a larger, virtual, consortia day?

Rock River Library Consortium (RRLC)

- No report.

System Wide Automated Network (SWAN)

Enhanced Notifications with MessageBee

The SWAN membership approved the addition of a new service for all 100 libraries with a goal of branding automated notifications for materials requested and borrowed. Each library will have its own branding, and language preferences for English, Spanish, and Polish will be included, which required SWAN and Unique



Management to configure 3,600 total notice templates. Each library will have access to its own portal to monitor notifications and take steps to mitigate notification issues. The impact of the MessageBee service will be tracked using metrics on the return rate of materials as noted by libraries that have moved to enhanced notifications, such as Brooklyn Public Library. Our go-live is anticipated in June 2023.

Addison Public Library

SWAN approved the addition of Addison Public Library for full membership. The library has a service population of 36,942 and an operating budget of \$5.4 million. The library would become the 5th largest contributor to the consortium, similar to Downers Grove Public Library, and become our 101st library.

SWAN and Addison have migration teams selected and training for Addison staff is underway. The circulation go-live is planned for November 2023.

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.

Transport Layer Security: SIP2 Migration

The use of the SIP2 protocol within the library software market means any services offered will be exposing personally identifiable information of our library cardholders. SWAN has been working to switch vendors to secure, encrypted data transport which effectively "wraps" the SIP2 protocol within a secure layer. The vendors now using secured, encrypted connections to our systems are the following:

- OverDrive
- Hoopla
- Comics Plus

- Kanopy (in progress)

If other consortia are interested in TLS SIP2, please feel free to contact us for discussion on the methods SWAN is utilizing for this initiative.

Single Sign-On Pilot

SWAN is researching a platform to manage library staff access to our library services platform. Our pilot with Keycloak concluded that the solution was insufficient for our needs. The pilot project has now shifted to researching Gluu, an open-source solution which allows for a free local setup but with hosted options if the SSO meets our needs for a wider roll-out.

Online Learning Courses

SWAN continues to build up its courses and has recently added three new interactive classes geared towards library directors and administrators. The leadership turnover within the 100 libraries over the past two years has at the minimum impacted 35 of the 100 libraries, so our approach with these classes is to instill a foundation for resource sharing and the logic of demand management within a library consortium.

PS301: Resource Sharing in SWAN

The strength of our SWAN consortium is built on a philosophy and practice of resource sharing amongst our SWAN colleagues, as well as with libraries in Illinois and across the globe. The focus of this course is to provide an overview of resource sharing models impacting SWAN libraries. Through interlibrary loan and reciprocal borrowing SWAN libraries share material through library-to-library and patron-to-library transactions.

PS304: Demand Management

Demand Management is the official title for how holds are created and filled in our system. This course takes a look at "how the sausage is made" in determining whether a hold record can be created, how policies impact holds, and how demand management works to fulfill holds.

PS303: Holds Daily Processing

Processing holds is ongoing and specific daily tasks that must be completed. In addition to trapping holds as items are checked-in throughout the day, staff are also responsible for pulling items to fill holds, managing the hold shelf, and working with special cases. This course outlines those ongoing and daily functions.