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## Executive Director Report, April 2023

### *Provides leadership in ensuring sustainable, equitable resource sharing*

#### **Meet and Greets with RAILS Executive Director**

We are continuing on our series of in person events this Spring intended to further introduce me to the RAILS membership. These meetings are targeted in the areas of: Bourbonnais, Burr Ridge, Coal Valley, Algonquin, Peoria, Quincy, and Rockford.

We held an in person meetup at Fondulac District Library in East Peoria on Wednesday, April 5. Huge thanks to FDL Director Genna Buhr and her staff for the warm welcome and tour. Seventeen people attended the meeting, and we had a good conversation about the future of libraries in Illinois. Thank you to RAILS Board Member Thomas Stagg for attending and for his tour of Alpha Park Public Library the following day.

Feedback from the event included general library concerns about how to keep up with unfunded mandates, how to achieve desires for exemplary service while balancing limited funds, burnout/occupational stress for library workers, and how to effectively and responsibly serve the unserved. Library workers attending expressed appreciation for the new library director site visits from Dan Bostrom, the value offered by the joint purchasing program, and the seamless delivery of materials.

Upcoming Meet and Greets are scheduled for:

Thursday, April 27 from 2-3:30 p.m. at RAILS in Coal Valley

Wednesday, May 3 from 1-2:30pm at the Rockford Public Library

Wednesday, May 10 from 1:30-3pm at the Algonquin Area Public Library District

Thursday, May 18 from 9-10:30am at the Quincy Public Library

#### **Networking Group Visits**

In addition to our great Meet and Greet events, I've had the opportunity to attend some networking group meetings as well. On May 14, I attended the Tri-County Directors meeting at the beautiful Prairie Creek Library in Dwight. I really appreciated the candor and discussion from these directors of mostly small and rural libraries in Central Illinois. Special thanks to the hosting library director Sherrie Rhodes and to the group facilitator and Odell Public Library District Director Cathy Grafton for the visit.

I was also able to attend the Association of Rural Community Directors Networking Group Visit at the Tremont District Library in Tremont, Illinois. We had a lively conversation with great questions, and special thanks to TDL's Director Maria Ford for the tour of their bright renovated space and the wonderful hospitality.

I'm also looking forward to a meeting with the North Suburban Library Directors group on the afternoon of Monday, April 24. I really appreciate the opportunity to meet with so many RAILS members and hear what is important to them.

### **Visits to RAILS Board Member libraries and Delivery Hubs**

Huge thanks to our RAILS Board of Directors that have welcomed me for one-on-one visits already, including Alex Vancina at the New Lenox Public Library District, Karen Voitik at the Shorewood Troy Public Library, Rene Leyva at the Fossil Ridge Public Library, Thomas Stagg at the Alpha Park Public Library, and Robin Helenthal at the Peoria Public Library. I have enjoyed getting to know your thoughts and priorities for RAILS through these meetings, and I look forward to the opportunity to meet with the rest of you soon.

I've also had the opportunity to meet with the Delivery staff at two of our Delivery hubs: Bolingbrook and East Peoria. I appreciate the staff taking the time to meet with me and talk to me about their ideas and thoughts about RAILS. Staff mentioned the need for new vehicles, their desire for the return of an in person staff day, opportunities for training and learning, and what they like about their roles at RAILS. These frank conversations have given me a new appreciation for the valuable work they do, and I'm very grateful to them and the Delivery Service Managers that make these meetings possible.

### **RAILS Minute and Sparks Podcast**

The most recent RAILS Minute video series focused on several current topics, including the Board election, feedback from the Meet & Greets, and legislative updates. Thanks to Digital Marketing and Communications Specialist Ola Gronski and Member Engagement Manager Dan Bostrom for all their continued work on this offering.

We also recently released a Sparks podcast focused on the Illinois Libraries Present programming collective, discussing the history of the program as well as their exciting upcoming speakers. It is wonderful to highlight such a grassroots effort to further resource sharing in Illinois public libraries. Huge thanks to Mara Barbel, Jennifer Czajka, and Kate Hall for their enthusiastic discussion.

### **International Coalition of Library Consortia (ICOLC)**

RAILS Director of Technology Services Anne Slaughter, Director of Library Resources and Programs Leila Heath, and myself recently had the opportunity to attend the annual conference of the International Coalition of Library Consortia (ICOLC) in St. Louis from April 16 – 19. Their sessions were so informative and well organized, and it was wonderful to connect with so many other organizations that represent libraries in a consortium environment. Looking forward to growing my network with some of the great leaders I met there and explore how we can work together.

## Investigation of In-Person Meetings at RAILS Service Centers

We've recently begun an investigation into reopening our meeting rooms for reservation by RAILS members at our Burr Ridge and Coal Valley Service Centers. RAILS Staff are updating our internal procedures and we plan to release more information about this soon, ready to reopen for Fall 2023.

## *Assist member libraries in preparing for the future*

### IL House Bill 2789

As you likely have seen, [Illinois House Bill 2789](#) requires public and school libraries to adopt policies against censorship and book banning to receive grant funding from the Illinois State Library. The bill passed the House on March 22 and passed its first committee in the Senate on April 19. Illinois Secretary of State Alexi Giannoulias drafted and is a strong proponent of this legislation, along with the Illinois State Library, the Illinois Library Association, the Association of Illinois School Library Educators (AISLE) and others.

### IL Senate Bill 2419

A second piece of legislation, [Illinois Senate Bill 2419](#), otherwise known as the License to Read Act is also sponsored by Secretary of State Alexi Giannoulias and is focused on allowing the State Librarian to negotiate with publishers of e-books and e-audiobooks on behalf of libraries in search of reasonable terms. The legislation also allows the State Librarian to award grants that develop, expand, or support the acquisition of e-books and e-audiobooks in Illinois. This legislation passed the Senate on March 23 and has been placed for a 2<sup>nd</sup> reading in the House on April 20. More to report as we know more.

### Secretary of State Budget

Secretary of State Alexi Giannoulias' budget is also being reviewed through the legislative process (HB4016), and the budget does currently include an ask for \$5 million to support a statewide database solution. This budget is still being considered and we are very hopeful that the huge value this brings to Illinois will be approved.

## *Leads alongside member libraries to develop and strengthen Illinois library community*

### May ISLAC Meeting

The Illinois State Library Advisory Committee (ISLAC) is scheduled to meet in Springfield on Thursday, May 25, and I will be in attendance. One topic identified for the May agenda is the importance of digital equity and Broadband infrastructure in Illinois. RAILS Director of Technology Services Anne Slaughter has been invited to present. More to share about the meeting at the May RAILS Board Meeting.

## **City Club Defending Democracy with the Chicago Public Library**

It was my pleasure to attend the City Club: Defending Democracy: The Role of Libraries and Civic Leaders in the Fight Against Book Bans and Censorship on April 20<sup>th</sup>. The event featured a moderated conversation between Chicago Public Library Commissioner Chris Brown, Digital Public Library of America Executive Director John Bracken, and American Library Association Executive Director Tracie Hall. Also in attendance were representatives from AISLE, ILA, IHLS, and the Illinois State Library. I also had the opportunity to briefly meet Secretary of State Alexi Giannoulias and his staff, who deeply expressed his support for Illinois libraries. This is just one more example of the wonderful partnerships between our organizations as we face these important issues head on.

## ***RAILS Staff & Service Center News***

### **Emergency Purchase Investigation**

Last month I reported on our investigation for emergency purchase. We determined that this route is available to us, but if we do choose to ask the Board for this avenue, it would be best to wait until FY2024. In the meantime, we are increasingly hopeful that we have located a potential source of vehicles with a government contract. We will keep you aware of future developments.

### **Statement of Economic Interest**

Thanks to the Board for getting your Statement of Economic Interest in such a timely manner. It is appreciated by our Administrative staff – thank you!

## ***Looking Ahead to May***

- **MARK YOUR CALENDAR: May 26<sup>th</sup> Board Meeting starts at 10am due to the holiday weekend**
- **May Service of the Month – Update on RAILS discounts/group purchases and Consortia Manager**
- **May Board Development topic – RAILS digital marketing and communications initiatives**



## This Month at RAILS – April 2023

### THE TOP THREE

In response to board member feedback, each month we provide brief talking points to help you spread the word about specific RAILS programs/services. Here are this month's top three:

#### **RAILS Delivery Video Training Series**

Have questions about RAILS delivery? Check out the new [RAILS Delivery Training Series](#). The five videos are short and address the delivery topics members ask about most. There's even a video on how to get further support from RAILS Delivery.

#### **Northern Illinois University RAILS Member Meetup**

Staff and trustees from all Illinois libraries are invited to a networking event at Northern Illinois University's Founders Memorial Library on May 11 from 10 a.m. – noon. The event includes a tour with a chance to experience Science on a Sphere, a global display system that projects planetary data onto a six-foot diameter sphere. [Find out more and register on L2](#).

#### **New Hiveclass Discount and Webinar**

RAILS is offering a new discount for [Hiveclass](#). This youth sports digital encyclopedia offers access to over 1,500 educational videos covering 15 sports/activities, including soccer, dance, fitness, basketball, yoga, mindfulness, and more. Members can [register for an informational webinar](#) on May 16 at 11 a.m.

*Provides leadership in ensuring sustainable, equitable resource sharing*

## Enhance sharing of knowledge and best practices

### **Northern Illinois University RAILS Member Meetup**

All Illinois library staff and trustees are welcome at our member meetup at the Founders Memorial Library at Northern Illinois University, Thursday, May 11 from 10 a.m. - noon. The event will include a tour and an opportunity to connect/network with colleagues. Coffee and light refreshments will be served. [See more information/register](#).

### **SLA Illinois Networking Event at Shorefront Legacy Center**

The Special Libraries Association Illinois Community is hosting an in-person tour of the [Shorefront Legacy Center](#) in Evanston, Wednesday, August 16 from 3 - 4 p.m. The Center collects, preserves, and educates people on Black history on Chicago's suburban North Shore. All Illinois library staff and trustees are welcome. [Register via Eventbrite](#).

### **RAILS at Reaching Forward South Conference**

Brian Smith, Applications & Web Developer, staffed the RAILS table at [Reaching Forward South](#) in O'Fallon, Illinois on April 14. Due to the location of the conference, few RAILS members attended, but we had the opportunity to promote RAILS statewide services to Illinois Heartland Library System attendees. There were 32 visitors to the RAILS booth.

### **RAILS Visit to High School Library Networking Group**

RAILS Board member Monica Tolva Caldicott invited Member Engagement Manager Dan Bostrom to speak at the North Suburban High School Library Networking Group meeting on April 27. Dan will talk about RAILS support for school libraries in general and other topics.

### **Kane County Law Library & Self Help Legal Center Tour**

The Special Libraries Association Illinois Community organized an in-person tour of the Kane County Law Library & Self Help Legal Center in March. The event was open to all Illinois library staff. Six people participated.

### **April RAILS Member Library Visit**

Dan Bostrom, RAILS Member Engagement Manager, visited Lake Park East High School, the sibling to Lake Park West High School (which Dan visited in February). Lake Park East serves first-year students and sophomores from Roselle, Medinah, Bloomingdale, Itasca, Wood Dale, Keeneyville, and Hanover Park.

### **RAILS Social Media Engagement**

RAILS continues to engage members via Facebook, Instagram, LinkedIn, and Twitter. See details at the end of this report.

## Leverage economies of scale to provide greater purchasing power

### **New Hiveclass Discount and Webinar**

[Hiveclass](#) is a youth sports training digital encyclopedia that offers access to over 1,500 educational videos covering 15 sports/activities, including soccer, dance, fitness, basketball, yoga, mindfulness, and more. Members can register for an [informational webinar](#) on May 16 at 11 a.m.

### **RDA Toolkit Group Purchase Sign-up and Renewal**

RDA: Resource Description & Access is an international standard for the creation of library and cultural heritage metadata. [RDA Toolkit](#)'s subscription-based online platform allows catalogers from all types and sizes of libraries to create their own metadata. New sign-ups and renewals are due by June 1.

### **EBSCO Packages for Public and K-12 Libraries, Learning Express, FinancialFit**

[EBSCO packages for public libraries](#) and [EBSCO packages for K-12 libraries](#) include a variety of core databases and additional options, including Learning Express, Library Aware, and the new FinancialFit. New sign-ups and renewals are due by June 1.

### **Career Online High School Update**

[Career Online High School](#) is an 18-credit, vocation-based high school completion program. The following table provides the latest information on the use of the program as of April 1.

Scholarships Awarded	Total Graduates	Current Number of Students in Program	RAILS Graduation Rate/National Rate
372	165	95	60%/53%

## **Seek greater efficiencies, innovations, and enhancements to delivery services**

### **New RAILS Delivery Video Series Addresses Frequently Asked Member Questions**

RAILS created a new [RAILS Delivery Training Series](#) for library staff. The five videos cover topics members often ask about, including preparing materials for delivery and labeling. They are available in a playlist on our YouTube channel. We recommend using them when onboarding new employees or as a refresher for anyone who works with RAILS delivery.

## **Work collaboratively to identify and support shared catalog solutions and expand resource sharing**

### **eRead Illinois Renewals Continue**

The eRead Illinois Axis 360 renewal period began in March and runs through May. As of April 14, 592 libraries have renewed, including 330 school libraries, 236 public libraries, 20 academic libraries, and 6 specialized libraries. There have been 27 new signups, including 21 school libraries, 5 public libraries, and 1 academic library.

RAILS continues to purchase popular e-books and audiobooks in Spanish for the eRead Illinois collection in response to member feedback. As of April 11, 381 items have been added to the collection.

## Use of RAILS E-Resources

### eRead Illinois Axis 360 Checkouts

Time Period	E-Books	Audiobooks	Total
March 2023	21,497	17,141	38,638
FY 2023 (July 2022 – June 2023)	190,347	143,783	334,131

### Inkie.org Library Views

Time Period	Number of Views
March 2023	2,199
FY 2023	15,879

### Explore More Illinois Update

[Explore More Illinois](#) is RAILS' statewide online cultural and recreational pass program.

As of April 11, 419 Illinois libraries participate: 328 RAILS public libraries and two community colleges (Illinois Community College and Oakton Community College), and 88 Illinois Heartland Library System public libraries and one community college (Lincoln Land Community College). There are [54 attractions](#).



Patrons from participating libraries made 248 reservations in March. The most popular attractions (by number of reservations) were the Museum of Science and Industry in Chicago (70), DuPage Children's Museum in Naperville (37), Chicago Children's Museum (32), Discovery Center Museum in Rockford (25), and Fox River Grove Memorial Public Library (22).

Migrating attractions from Chicago Public Library's paper museum pass program into Explore More Illinois was a focus in March and April. So far, seven attractions have submitted offers.

## *Assist member libraries in preparing for the future*

### Future-focused professional development and member engagement efforts

#### RAILS Awards Continuing Education Event (CE) Grants

RAILS periodically offers [training grants](#) of up to \$2,000 for libraries, networking groups, or consortia to support CE for member library staff throughout our service area. Recent grant awardees include:

- College of DuPage Library/DePaul University Library – [Illinois Information Literacy Summit](#)
- Library UX Chicago – Ethnographic Data in Libraries
- RSA (RAILS shared catalog consortium) – RSA Day



- Northbrook Public Library – How to Tell a Story with Your Library’s Data

Details on the Library UX Chicago and Northbrook Public Library events will be added to L2 and the weekly *RAILS E-News* when available.

### Successful Directors University 2.0 Event Held in Springfield



Directors University 2.0 took place in April in Springfield. Forty Illinois public library directors (27 from RAILS) who previously attended either Directors University or SPLMI (Statewide Public Library Management Institute) participated in this three-day intensive training and networking event. Joe Filapek, RAILS Consulting & CE Director, served on the planning committee.

Topics covered included budgeting, HR, DEI (diversity, equity, and inclusion), capital improvement planning, self-care, and succession planning. Illinois State Library Director Greg McCormick spoke about recent legislation and its potential impact on libraries.

Directors University will be held August 1-3 in Springfield for new public library directors.

***Leads alongside member libraries to develop and strengthen Illinois library community***

### **Strengthen collaborative relationships with partner library organizations**

#### **April Meeting with AISLE, CPS, IHLS, ILA, and ISL**

RAILS has monthly meetings with representatives from the Association of Illinois School Library Educators (AISLE), Chicago Public Schools (CPS), Illinois Heartland Library System (IHLS), Illinois Library Association (ILA), and the Illinois State Library (ISL) to discuss ways we can work collaboratively to support school libraries.

April meeting topics included an update on RAILS’ school library data project, materials challenges and the possible formation of a Regional Rapid Response Team to help libraries facing challenges, and a fall online training event for those working in school libraries with no formal library education. The next meeting of the group is May 2.

# MARCH 2023: analytics

● Facebook ● Instagram ● Twitter ● LinkedIn

## followers



	February 2023	March 2023
	2,224	2,244
	1,213	1,223
	1,401	1,409
	909	909

## reach



	February 2023	March 2023
	7,442	6,487
	2,871	2,141
	N/A	N/A
	N/A	N/A

## impressions



	February 2023	March 2023
	N/A	N/A
	9,432	9,205
	5,782	4,919
	4,432	4,432

## engagement



	February 2023	March 2023
	2,174	2,377
	539	571
	N/A	N/A
	139	170

# MARCH 2023: top posts



**Top Tweet** earned 778 impressions

According to [@AISLEd\\_org](https://aisled.org), more than 25 research studies have proven conclusively that licensed school librarians contribute directly to student achievement.

For more information, visit [aisled.org](https://aisled.org).  
[pic.twitter.com/7IS0aGse5z](https://pic.twitter.com/7IS0aGse5z)



# Consortial Reports

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## 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 15<sup>th</sup>. 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 20<sup>th</sup> 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 5<sup>th</sup> largest contributor to the consortium, similar to Downers Grove Public Library, and become our 101<sup>st</sup> 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.