

Consortial Reports

October 16, 2023

Consortium of Academic and Research Libraries in Illinois (CARLI/I-Share)

The CARLI Annual Meeting is scheduled for Thursday, November 16, in-person in Champaign, Illinois.

New I-Share Libraries

CARLI has started adding new I-Share Libraries. As of July 2023, Saint John's College of Nursing (Springfield) and Illinois College of Optometry (Chicago) were added to I-Share. Starting in October our "Class of 2024" will begin their migration: Chicago Theological Seminary (Chicago), City Colleges of Chicago (Chicago), College of Lake County (Grayslake), Elgin Community College (Elgin), and Prairie State College (Chicago Heights). We expect their migration and integration into our Resource Sharing to be completed by July 2024. CARLI has hired two University of Illinois iSchool Graduate Assistants to assist with this migration. We are excited to have them on board.

SCOERS Grant Opportunities

CARLI has held three rounds of grant opportunities to distribute funds from the Illinois SCOERS (Support for Creation of Open Educational Resources) Grant received from the U.S. Department of Education. Through this grant funding, Illinois SCOERS will provide access to open textbooks and personalized learning tools for entry-level courses in high demand. Much more information is available on the CARLI website: <https://www.carli.illinois.edu/products-services/collections-management/IllinoisSCOERS>

Student OER Survey

Related to the Illinois SCOERS project, CARLI is currently undertaking a survey of students at individual institutions (with the help of librarians at those institutions) to help gain insight into the need for OER (Open Educational Resources). More information can be found on the CARLI website: <https://www.carli.illinois.edu/illinois-course-materials-survey-student-perspective>

CARLI & University of Illinois Press Pilot Program

CARLI and the University of Illinois Press have embarked on a 5-year pilot program to provide access to the UI Press journals to all CARLI libraries. The initiative is funded by the University of Illinois System Office of the Executive Vice President and Vice President for Academic Affairs and provides access to over 40 journals.

Cooperative Computer Services (CCS)

New and Potential Members

Warren-Newport: WNPL went live over Labor Day weekend. CCS is completing a project retrospective.

Mount Prospect: CCS will begin onboarding Mt. Prospect Public Library in November for an October 2024 go live.

Waukegan: Executive Committee has recommended Waukegan membership to Governing Board. Governing Board will vote on their membership in November.

Find More Illinois Investigation

CCS is investigating consortium membership in Find More Illinois. Governing Board will vote on potential membership in November.

IT Support

Due to an unplanned staff absence, CCS will be working with Outsource IT Solutions Group for office network and hardware support. Service to member libraries for Polaris-related issues will not change.

October is Leap Month for Cataloging and Serials Staff

Over the last two years, Innovative has added cataloging and serials features to Leap. CCS is gathering constructive feedback from technical services staff on what is working well and what can be improved when it comes to these Leap features.

To help gather feedback, CCS staff have planned a month of Leap activities for cataloging and serials staff. The activities include:

- Completing the Cataloging in Leap and/or Serials in Leap online courses.
- Using Leap to perform different tasks during the month, and recording your constructive feedback on the “Rose, Buds, Thorns, Questions” worksheet.
- Group activity and discussion at the November Cataloging and Metadata Management Technical Group meeting.

Pinnacle Library Cooperative

In August, Innovative migrated our hosted Polaris servers to a new environment. The process took about 15 hours, but we were fortunate to complete the project Sunday evening/Monday morning while libraries were closed. The new servers are hosted within the Clarivate/ProQuest family.

In response to the rash of bomb threats that libraries have been receiving, we have temporarily removed the Unique Chat widget from the public catalog and all library websites.

Continuing our focus on succession planning, Matt has completed a turnover document and distributed it to all board members. This document is meant to guide the board in the event of an unexpected absence of the Pinnacle Director. It contains passwords, links to resources, and descriptions of administrative procedures to assist with the transition/absence.

We've made a job offer for the vacant Member Services Librarian position! The candidate is expected to start in early October.

PrairieCat

Onboarding: Winnebago Public Library

PrairieCat continues to work with the Winnebago Public Library to onboard them into our consortium. Currently, their go-live date is scheduled for mid-January. They are coming to PrairieCat from a stand-alone TLC system. Winnebago will be joining us as a fully participating member.

PUG Day

PrairieCat's annual PUG Day was held on September 29th. This was our first in-person conference since 2019, and we had over 280 attendees. The keynote was delivered by Mia Henry from Freedom Lifted. Freedom Lifted supports justice-centered leadership development through online learning, training, and coaching.

This year, PUG Day attendees could choose from 19 different sessions ranging from leadership issues, non-resident cards and Card for Kids, FOIA and first amendment issues, updates on software features from our ILS vendor and many more topics relevant to library staff and directors. We thank our members who presented, RAILS, and Joe Filapek especially, for contributing to PUG Day again this year.

PrairieCat Support Website

Over the last year, PrairieCat completely redesigned our support website (<https://support.prairiecat.info>). We continue to refine this work and hopefully will be able to bring additional features live in the coming year.

Software Updates and Data Cleanup

We are very close to officially launching our new Discovery software, Innovative's Vega Discovery. This process has been a long one, but the software is at a place now where we feel it is ready for patron use. We are tentatively scheduled to begin cutting over in early November.

PrairieCat recently purchased Springshare's CRM product. This hosted CRM will allow us to consolidate the copious data we have about our members into one easily accessible and searchable interface. We are beginning the process of configuration and hopefully will have this product up and running shortly. We look forward to replacing numerous spreadsheets with one interface.

We will also shortly be hiring a part time, temporary cataloger to assist with database cleanup projects. As we have grown in the past few years, and now in addition to the Vega go-live, we find that we have several cleanup projects from previous data merges that need to be addressed. PrairieCat cataloging staff felt that it would be advisable to hire a temporary cataloger to assist with this cleanup in a timely fashion.

Rock River Library Consortium (RRLC)

No report.

Resource Sharing Alliance (RSA)

RSA Independence Project and Fee Structure

The RSA Independence Project (RIP) is now in full swing. The RSA Board is working with RAILS to set up some 3rd party consulting. We're also investigating hiring a 3rd party communications consultant to help

get the word out in a formal and cohesive manor. We've returned to our lawyer draft one of the Intergovernmental agreement (IGA) between member libraries that will form the 'new' RSA. We've working on draft one of the new RSA Bylaws. The RSA Board is revising RSA's fee structure as well. All three documents – IGA, Bylaws, and fee structure – will be rolled out on July 1, 2024. This will formally migrate RSA from a 501c3 Not for Profit to an Illinois Intergovernmental Instrumentality. We don't expect much push-back on the IGA or Bylaws. The new fee structure will be painful to many member libraries no matter what formula we choose to move forward with. This is our major area of concern for the conversion.

RSA Support Site

Our new support site, <https://support.librariesofrsa.org> is not only live, but is now considered our primary support site, and is being improved daily. We've added many new pages including a detailed Independence Project page, a page outlining all reports created and sent out by RSA's many products and more. We're hearing very positive things in our feedback from members.

Library User Cleanup

RSA staff are working with each of our 143 member libraries to reduce the number of expired users in the system. We've sent reports with patrons expired more than two years ago and no outstanding bills on their account, and a report of patrons expired three years or more ago with less than \$25 in non-lost or damaged item bills, and no collections bills on their accounts. In total, those reports listed out about 95,000 expired patrons. Members review and remove patrons they wish to remain in the system for various reasons, then RSA staff bulk remove the rest.

Temp Record Cataloging Process

The Cataloging Department completed cataloging our once large backlog of new items without records earlier this year. We've moved on to upgrading temp records of items with no matching OCLC records in our system. The new temp record process for items without matching records is saving members hundreds of hours a month in item submissions, reduces the number of duplicate submissions for the same title, and has greatly increased the speed RSA staff can upgrade these items to full OCLC records.

School Library Staff Training

RSA's Member Services Department is working with our new school library staff to schedule visits and training. We're back to holding in-person training events, in-person new Director and informational visits, and generally just getting back out there. Members appreciate our attendance in their libraries and are volunteering to serve as regional training locations for group sessions.

System Wide Automated Network (SWAN)

Mobile App Evaluation

Beginning this fall 2023 we will conduct an evaluation of the landscape of catalog mobile apps. We are currently using BLUEcloud Mobile as our supported app, but we are encouraged by recent developments in LiDA, the companion app to Aspen Discovery. Moving to LiDA would give patrons a consistent experience with search and account management across platforms, and development of new features has been as frequent as we see with Aspen. Though we're most interested in LiDA at present, our evaluation will not neglect other offerings, including the new Library App released by SOLUS this year, and our existing BLUEcloud Mobile app.

MessageBee “Phase 2” Development

Now that we are fully migrated to the MessageBee platform for voice, SMS, and e-mail patron notifications, we have concluded what we have been informally calling “Phase 1.” We now have a short list of adjustments planned and future developments we are tracking. During “Phase 2,” we have reduced our regular meetings with Unique Management, but we will continue to meet monthly to receive support and advocate for development of the platform that will serve our members.

- Deployed a new “reports only” tier of access to the MessageBee portal in response to member feedback
- Tracking member and patron feedback on the loss of autorenewal notifications to determine if this is something we need to build out
- Completed migration of phone notifications from SWAN Central portal to individual libraries
- Monitoring development of features for direct SMS messages to individual patrons and lists with plans to implement if possible

Infographic on Value of SWAN Membership

The Decennial Act statement SWAN provided its public library districts prompted a discussion at the June 2023 membership meeting about the benefits of SWAN with cost savings and cost avoidance perspectives. SWAN will provide an infographic for member libraries on the benefits of membership to coincide with July 2024 membership fees.

Managed Detection and Response (MDR) with Arctic Wolf

We have completed the onboarding process with Arctic Wolf, a provider of security monitoring, threat detection, and response. The suite of services we have purchased includes a collection of training materials for staff. These are designed to raise awareness of cybersecurity and provide SWAN staff with the tools to recognize cybersecurity threats, such as phishing attempts.

Continued Support Site Development

SWAN recently migrated the Support website (support.swanlibraries.net) to hosting with Pantheon, and then upgraded the Support website to Drupal 9 from the previous end of life version. Drupal 9’s end of life is scheduled for November 2023, so we plan to further upgrade to Drupal 10 before the 2023 year is out. We will investigate migrating the SWAN patron site (www.swanlibraries.net) to Pantheon as well.

Ticketing System & CRM Investigation

Our current ticketing system, OTRS, is no longer meeting our support needs. The included tools for reporting, categorization, prioritization, and trend analysis are all either rudimentary or non-existent, and the version of OTRS we currently use is no longer supported. This year, we plan to do an evaluation of alternative services. Beyond a straightforward help desk solution, we are interested in tools that integrate customer relationship management (CRM) and possibly a documentation platform. A more robust system can help us to tune our member support services, reduce response time, more easily provide access to documentation and training options, and give us the analytical tools we need to determine where members are struggling to adjust our support strategy accordingly.

SWAN Headquarters Evaluation & Move

The lease for 800 Quail Ridge Drive ends November 2024 and SWAN will consider a downsize of the commercial office space. Searching for a new space will entail selecting a representative for SWAN to

assist with the search, as well as negotiating a new lease. We have some preliminary work that gives us some square footage of a downsized space, which will also mean SWAN will need to deaccession some of the office furniture that will no longer be needed. Conversations with commercial tenant services have indicated that SWAN should begin this work in March 2024, after selecting our commercial real estate representative.

Network Infrastructure Updates

As we are beginning to plan for hardware retirements and the eventual relocation of SWAN headquarters, we have been taking an active look at our on-premises network infrastructure. Some of our internal systems are approaching end of life, however, as most of our critical systems are now hosted, our approach will be to take a lighter “footprint.” Once completed, this project will significantly reduce our on-premises footprint and effectively bring all our critical systems into our cloud infrastructure. This will not only provide better reliability of systems, but also ensure that we’re as flexible as possible when it’s time to relocate.

Strategic Planning

Our next phase of 5-year strategic planning will begin in earnest in calendar 2024. This will entail forming a SWAN Board committee to create an RFP document, review proposals, and select a strategic planning consultant. The process from that point will include feedback from membership and SWAN staff.

SWAN 50th Anniversary

SWAN was established in 1974 and in 2024 the organization will turn 50 years old. The strategic plan initiative could be incorporated into a celebration of what libraries in Illinois have built cooperatively. The 50th anniversary could coincide with new office space, and a new five-year strategic plan.