

# Consortia Reports

January 22, 2024

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

### CARLI Counts: Analytics and Advocacy for Service Development program

CARLI is planning cohort five of the CARLI Counts: Analytics and Advocacy for Service Development program.

### Illinois Student Survey

4,635 students attending 36 Illinois non-for-profit institutions have participated so far in the "[Illinois Course Materials Survey: Student Perspective!](#)" to help CARLI members and CARLI learn more about students' needs regarding affordable course materials and Open Educational Resources.

### OER Training

CARLI is offering a 3-week virtual course (including both synchronous and asynchronous sessions) on Understanding and Promoting Open Educational Resources in February 2024.

### New I-Share Libraries

The New I-Share Libraries project is continuing for the five institutions that will go live locally in June 2024, and be added to I-Share resource sharing in July 2024.

New I-Share libraries in this cohort are Chicago Theological Seminary, City Colleges of Chicago, College of Lake County, Elgin Community College, and Prairie State College.

## Cooperative Computer Services (CCS)

### New and Potential Members

Onboarding for Waukegan and Mt. Prospect has begun. These members will go live in October 2024.

### Find More Illinois Investigation

Governing Board voted to move forward with consortial membership in Find More Illinois. Debra Wischmeyer is working with RAILS FMI staff Barb and Eric on our project plan and onboarding. We are looking forward to most CCS libraries going live this summer.

## Polaris 7.5

The training database was updated to Polaris 7.5 on November 17. CCS staff completed QA testing assignments in November and December.

Polaris 7.5 includes many new features and workflows, including:

- Damaged Item workflows
- Weeding workflow
- Waiver workflow for approving fine waivers

CCS staff are currently evaluating new features and working with relevant advisory and technical groups to determine if and how we are moving forward with the new features and permissions.

## Results: Leap Month for Cataloging and Serials Staff

The activities that CCS staff facilitated during Leap Month allowed the member libraries' staff to provide feedback and constructive criticism on the cataloging and serials functions of Leap. While some of the opinions varied, many of the suggestions for improvements and criticism point to the importance of efficiency. This research demonstrates that cataloging staff feel that the Staff Client is more efficient for everyday tasks than Leap. This is not just because it takes time to get used to Leap. Staff clearly feel that more clicks are needed to do everything in Leap than the Staff Client. There are still functions necessary for their work that are missing from Leap, but available in the Staff Client. It will be difficult to convince staff at the existing CCS member libraries to switch to Leap without it having achieved parity with the Staff Client. Development suggestions are being forwarded to Innovative. Contact Rachel Fischer for more information.

## Open Positions at CCS

<https://www.ccslib.org/employment>

CCS has posted two positions:

- User Experience Specialist: This is the vacancy created by Kathleen's departure from CCS
- Member Services Associate: This is a new position that will focus on training and support. Existing Member Services Librarians will develop the curriculum and strategy for training, this position is more an entry-level role (2 years of experience preferred, not required).

## CCS to Participate in GLAM Career Jam

From GLAM Organizers: GLAM presents a unique opportunity for students and alumni hailing from 15 of the most prestigious library programs in the United States to engage with recruiters from leading employers and professional organizations. If you're seeking exceptional talent to fill internships, practica, or full-time positions, or if you wish to enhance your organization's visibility, this event offers you the chance to connect with students and alumni representing schools recognized as the best in Library and Information Studies Programs by US News & World Report. All of this, conveniently in just one day.

CCS will participate in a few ways:

- February 5, Debra will speak on the Alternative Careers for Librarians panel
- February 23 CCS will offer

- 1:1 coaching/networking appointments for students
- 30-minute group sessions
  - CCS staff will host sessions and
  - CCS member library staff are invited to participate in panels

### Administrative Changes

CCS is moving from twice monthly to biweekly payroll effective January 1, 2024.

CCS is moving towards ACH payments. We are working to fine tune to the approval process while maintaining our internal controls.

### New Directors

CCS held 6 new director orientations in November and December! It's been a busy quarter for retirements, promotions, and new libraries.

## Pinnacle Library Cooperative

### New Member Services Librarian

Pinnacle has welcomed Brittany Smith as our new Member Services Librarian! Brittany has previously worked as the Assistant Director and Manager of Adult Services at the Westmont Public Library and Circulation Coordinator at La Grange Park Public Library. The Member Services Librarian position focuses on training for library staff, creating documentation, and providing general ILS support.

### Annual Strategic Plan Meeting

In January, we will be hosting our annual strategic planning meeting. This meeting brings together the Governing Board, Assistant Directors from each library, committee chairs, and Pinnacle staff to discuss projects and action items related to our strategic plan.

### Polaris 7.5 Upgrade

On January 7, we upgraded to the newest version of Polaris. This upgrade includes new functionality to declare items damaged and some added structure to the weeding process.

### Chat Widget Re-Enabled

We previously reported that our chat widget was disabled for all libraries due to the increase in bomb threats. We've since re-enabled the widget for all libraries.

## PrairieCat

### Vega Discover

PrairieCat officially went live on our new catalog discovery layer, Vega Discover, on November 30<sup>th</sup>. All libraries are now running on Vega Discover. PrairieCat continues to work with Innovative on their Vega Promote product, which will allow libraries to create custom marketing campaigns. Consortia access to this product is about to be released, and we look forward to working further with the design team to provide input on this aspect of Vega.

### New Libraries

On Dec. 8<sup>th</sup>, Putnam Primary School went live on PrairieCat's system. They join the existing High school and Junior High as members of the PrairieCat database.

Winnebago Public Library is slated to go live on our system on January 24. Staff are working on finalizing things in preparation for this event. Winnebago was formerly a stand-alone library.

### Resource Sharing Summit

This year's Resource Sharing Summit will be held on March 7<sup>th</sup> at the DeKalb Public Library. The topic of discussion will be "serving the unserved".

### Rock River Library Consortium (RRLC)

Rock River Library Consortium (RRLC) recently held their first meeting of FY24, we welcomed two new librarians to the group, Christina Kessler, Director of Dixon Public Library and Nancy Myers, Librarian at Rock Falls Middle school. RRLC is updating their consortium bylaws which have not been reviewed or updated in eight years. We are also looking at the contract since we recently had some issues with members not fulfilling their obligations.

### Technology Grant

Members also approved awarding up to \$3000 to member libraries that applied for a technology grant. The grant required purchased technology be used in the library by the library staff to access TLC or for instruction on how to access the OPAC, databases or eBooks. Funds were provided from the RAILS Consortium support grant given to RRLC.

### MyLibro App

We rolled out our newest app to our schools (5-12 grade) and public libraries. MyLibro, all-in-one mobile solution for our libraries. The app is branded RRLC and is available in the Apple and Android app stores. The application stores patron's library card along with allowing patrons to store other family member's cards, search the OPAC, virtual assistant and Alexa skill for voice interaction, allows libraries to push notifications (such as closures). The app was purchased using RRLC Consortium grant funds.

Well, that seems to be all RRLC has to say this quarter. Thank you, RAILS, for your continued support.

### Resource Sharing Alliance (RSA)

#### RSA Independence Project Update

The RSA Independence Project (RIP) is right on track. We've got final versions of the intergovernmental agreement, Bylaws, Board Make-up, and RSA Membership Regions. We're in the final review and tweaking phase of entirely new fee structures; one for Public libraries, and a difference fee structure for School, Academic, and Special libraries. All of these documents should be finalized by the end of January and will be presented to the RSA membership at the mid-February Users Group meeting. RSA admin staff are also working up a large, multifaceted Director's Communications Package which will cover everything from the difference between RAILS and RSA, to the history of RSA and our fee structure, full services listings, and more. This package is intended to help Directors and School librarians educate their Board or Administrator about RSA and why these changes are being made. Finally, we've learned that we will

be required to elect an all new Board for our 1 July governance change to a Intergovernmental Instrumentality and have started planning for the best legal way to accomplish that prior to July.

### Catalog Rework and Record Upgrades

We had to unexpectedly rework our online catalog to add and enable mobile themed pages for patron use. This is due to the unexpected death of the SirsiDynix mobile catalog app. SirsiDynix and their mobile app vendor had a nasty breakup and the end result was the app being turned off by the vendor with no notice. Libraries world-wide are dealing with the fallout and explaining to the issue to patrons who have used the app for years.

The CMC started on working on about 5,000 OCLC Level 8 & M records in need of upgrade. Our Cataloging Supervisor wrote up extensive documentation on Symphony, the old OTRS help desk, and RSA's cataloging standards. She's working with the CMC and answer questions from their staff as they arise. We expect a multi-year effort will be required to finish up all the record upgrades.

### Cataloging and Member Services Updates

Cataloging Department staff are working to shrink our 3-day Basic Cataloging course down to a single day, 4-ish hour course. We expect to roll that out in 2nd quarter of 2024. This will help staff from our small and school libraries to attend more easily.

Member Services and Cataloging staff have resumed in person library visits. We do visits for new Directors, cataloging help and consulting, automation system tips and tricks, and general information sharing. The Cataloging visits have been an unexpectedly big hit, with members reaching out to proactively schedule visits.

### Index and Operations Manual

All departments have been working to create a consolidated index of all RSA policies, standards, procedures, cheat sheets, and guides. The consolidated index allows staff to quickly find source documents and last updated dates for all RSA member focused documents. This index will be uploaded to the website and used to ensure the various positional handbooks list out all the official documentation. We've also started working with several libraries to create a RSA Operations Manual that will list out a standardized method for running an automated library in our system. The manual isn't intended to be the only way to use RSA's services, but will serve as a starting point for libraries to develop their own local manuals, or for those libraries with only one or two staff to refer to when turnover occurs.

### User Clean-Up

RSA staff have just about finished working with each of our 143 member libraries to reduce the number of expired users in the system. As of mid-December, we're deleted over 50,000 users expired 3 or more years from the system. This project is now moving forward with reducing the numbers of duplicate users, fixing users with bad ID's, issues with incorrectly entered patron information, and other general patron database issues.

### Web-Based Reports

The Systems Department is creating new, web-based reports to enable self-service answers to ILLINET and IPLAR data questions. We're also working to create web-based reports with data and graphics Directors can provide to their Boards. This is very time-consuming to develop, but eliminates the hassle

of members looking through over 100 reports on our on-line reporting tool, where they try to find the correct iteration to answer a particular question. These reports will be far more interactive and allow libraries to slice and dice results in real-time to allow serendipitous examination of their data.

## System Wide Automated Network (SWAN)

### Reciprocal borrower online verification

Last month SWAN provided the six Pinnacle libraries access to our patron lookup tool. This tool was created for use with neighboring libraries that have SWAN library cardholders visiting as reciprocal borrowers. The tool has been available to non-SWAN libraries for several years now and was initially created to assist Chicago Public Library staff during the reciprocal borrower process.

To access the SWAN Reciprocal Borrower Lookup Tool, you must request login credentials from SWAN. Send email to [help@swanlibraries.net](mailto:help@swanlibraries.net) with the subject "Patron lookup account request." Provide the following information:

- Library Name
- Link to Library in L2
- Contact Person Name
- Phone Number for Verification
- Email Address for Follow-up

Using L2, we will assign a Username for access which matches your Library Control Number and create a randomized password. This account information will be shared in a follow-up phone call.

Once the account is created, the tool can be accessed at: <https://support.swanlibraries.net/help/reciprocal-borrower-patron-lookup>

### "SWAN Libraries +" Mobile App Now Aspen Library Discovery App

SWAN launched the Aspen Library Discovery App, known as LiDA, on December 12, 2023. LiDA gives patrons consistent experience with search and account management across our public platform. SWAN will be active in the development of new features as we have been with Aspen Discovery. The SWAN LiDA replaces the mobile app that has been in use since 2018.

### Growing Aspen Discovery Community in Illinois

Gail Borden Public Library and the SHARE consortium of 338 libraries are in the process of moving to the Aspen Discovery platform. Helen Plum Public Library and SWAN's 100 libraries bring the total to 440 libraries in Illinois using the library created platform.

The first Aspen Discovery conference "[AspenCon](#)" will be held this year in Golden, Colorado, and SWAN User Experience Manager Tara Wood has been invited to present. Libraries interested in learning about

firsthand Aspen Discovery, LiDA, and hosting support with ByWater Solutions should contact us at [help@swanlibraries.net](mailto:help@swanlibraries.net)

#### SWAN Events & Consulting for 2024

We have posted our full calendar of events for 2024 in L2. These can be found with the keyword search “swan2024” in L2. These 95 events are important membership engagement opportunities which provide feedback on SWAN’s resource sharing platform. For 2024, SWAN staff are introducing a new way for libraries to book consulting time through a new feature called Zoom Scheduler. This feature will poll multiple Outlook calendars and present date/times to libraries seeking to have individual consulting on topics such as circulation configuration, vendor integrations, and collection management, and book a Zoom meeting with SWAN staff directly based on availability.