

# Consortial Reports

July 15, 2024

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

### CARLI Governance Board

CARLI Governance Board meetings for the upcoming year are September 13, 2024, December 6, 2024, March 7, 2025, and June 13, 2025. Pattie Piotrowski (University of Illinois Springfield) is the Governance Board chair for July 1, 2024-June 30, 2025. New CARLI Governance Board Members include:

- Term: July 1, 2024-June 30, 2027
  - Stefanie Bluemle (Augustana College)
  - Dallas Long (Illinois State University)
  - Rachele Stivers (Heartland Community College)
- Term: July 1, 2024-June 30, 2025
  - Brian Keith (Eastern Illinois University)
  - Sarah McHone-Chase (Aurora University)
  - Frances Whaley (Kishwaukee College)

### I-Share

CARLI successfully migrated five libraries into I-Share on June 26, 2024. Those libraries are Chicago Theological Seminary, City Colleges of Chicago, College of Lake County, Elgin Community College, and Prairie State College. These institutions are live for local operations and will be live for Resource Sharing at the end of July. CARLI now has 94 libraries using I-Share. CARLI is working with Chicago History Museum to migrate to I-Share starting in February 2026.

CARLI will implement [Alma Anonymization](#) within I-Share in July 2025. CARLI held three webinars (recordings available) to prepare members for this implementation. Webinars include Alma: Overview of Alma Anonymization, Alma How-To: Anonymization and Analytics, and Alma How-To: Reporting and Anonymization.

### Member Closures

Lincoln Christian University and Oak Point University have closed. The Pritzker Military Museum & Library will close its Illinois location in July. The Pritzker Military Museum & Library has moved their library collection to Wisconsin.

### Staff

With an upcoming retirement, CARLI will be hiring an electronic services coordinator. This position was posted in June 2024.

## Diversity, Equity, and Inclusion

The CARLI Governance Board created a standing committee on Diversity, Equity, and Inclusion. Previously, CARLI had a task force that worked on this topic. With financial support from the UI System Office, CARLI is pleased to continue to offer its Building Diversity Graduate Assistantships.

## CARLI Scholarship

CARLI is pleased to announce recipients of the CARLI 2024–2025 Academic Year Scholarship that helps support the education of the dedicated staff of CARLI member libraries. The recipients are Amanda Helm, Abraham Lincoln Presidential Library; Grace Kraus, Prairie State College; Quinn Sluzenski, Newberry Library; Michelle Thole, Greenville University; and Alexandria Vlahos, Lewis & Clark Community College. The scholarship is funded by donors who have generously supported this important program, helping CARLI to grow the profession.

## Programming

CARLI and the University of Illinois Press have worked together at the request of the University of Illinois System President Tim Killeen to create a free symposium to celebrate of scholarship and the role of education in our democracy. The free symposium "[Free People Read Freely: Literacy, Inclusion, and Democracy](#)" will be held August 20-21 at the Krannert Center for the Performing Arts and the I Hotel and Illinois Conference Center, University of Illinois Urbana-Champaign. The program is open to anyone, but registration is required. There is a small fee if attendees wish to order a box lunch.

CARLI Annual Meeting will be October 22, 2024, in Champaign.

## Collections

The CARLI Member funded Ebook Program will include in its FY25 Access Collection titles from Wiley, Oxford University Press, and the University of Illinois Press. At the end of the Access Period, July 1, 2024 – June 30, 2025, CARLI selects titles for perpetual access for all CARLI Governing Members. CARLI now has an agreement with the Western Regional Storage Trust (WEST). Members may opt-in to participate in this shared serials storage program. The University of Illinois Urbana-Champaign Library is suspending indefinitely the Shared Institutional Repository project with CARLI.

## Open Educational Resources

CARLI will be asking for a No Cost Extension of its U.S. Department of Education grant Illinois SCOERs (Support for Creation of Open Educational Resources) this summer. CARLI is working with the Illinois State Library on its implementation of its OER Grants Program. CARLI will hold workshops on How to be an OER Project Director; Accessibility and OER; Instructional Design; Creative Commons, Copyright and Fair Use; and Diversity, Equity, and Inclusion in OER creation.

## EResources

With the Secretary of State / Illinois State Library providing statewide databases for fiscal year 2025, CARLI has worked with EBSCO to offer these databases to our members: Business Source Premier, Child Development & Adolescent Studies, Family & Society Studies Worldwide, Family Studies Abstracts, Humanities Source Ultimate, Left Index, Medline Ultimate, Novelist+, Time Magazine Archive, Urban Studies Abstracts, Violence & Abuse Abstracts, and Women's Studies International.

## Cooperative Computer Services (CCS)

### New Staff at CCS

Kiara Lyons and Gayatri Shah are new to CCS as our Member Services Associate and User Experience Specialist, respectively. Lyons began work in March and Shah in June. Lyons has been working closely with Debra Wischmeyer on the Find More Illinois implementation and library staff training. Shah will conduct comparative analysis of discovery tools over the next months. She is also reaching out to UX staff at other consortia to set up informational meetings.

### Find More Illinois Implementation

D. Wischmeyer is working with Eric Bain (RAILS) on Find More Illinois implementation. 10 CCS libraries are live on FMI as of June 30. Wischmeyer and Bain continue to troubleshoot NCIP settings to ensure a smooth workflow for consortium members.

### New Members

CCS is onboarding Mount Prospect Public Library and Waukegan Public Library. Library staff training and data testing begins in earnest in July, with an October 1 planned go live.

### Colocation Decommissioned

CCS has decommissioned our colocation site. All services are now hosted or managed locally from our Lincolnshire office.

### FY 2024-2025 Budget and Billings Approved

The CCS budget has been approved by Governing Board. Our total member billings will remain flat from last year, with most libraries seeing a decrease with the addition of new members Mount Prospect and Waukegan. CCS is changing our metric used to distribute OCLC billing from a self-reported number to an IPLAR figure. Previously, CCS collected collection spending for the previous fiscal year for any materials cataloged at the title level. Moving forward, CCS will use IPLAR collection expenditures (Total Collection Expenditures – eContent Expenditures). This will result in increases for several libraries—CCS is providing easement on those increases using Development funds.

### FY 2024-2025 Strategic Goals Set

Governing Board approved the goals drafted by CCS and Long Range Planning Committee. They are available at: [2024-2025 Goals.pdf](#)

### Bylaws to be Updated

Governing Board will vote in August on updated Bylaws and Policy related to CCS authority.

### [Summary of Suggested Bylaws and Policy Changes.pdf](#)

Proposed changes have been reviewed by Klein, Thorpe, Jenkins.

## Pinnacle Library Cooperative

### Pinnacle Swag Shop

Pinnacle has launched an online store where library staff can purchase Pinnacle-branded clothing items. The store, hosted through SpreadShop allows customization with the Pinnacle logo on various apparel

such as t-shirts, long sleeve shirts, hoodies, jackets. With this platform, there's no need to maintain a physical inventory - once an order is placed, Spreadshop handles all the printing and shipping. In the first 6 weeks, we received 13 orders.

### Accessibility Audits

With the recent uptick in accessibility audits for library websites, we began evaluating our digital presence, especially the third-party vendors we utilize. Our ILS vendor, Innovative, reported that they have experience working with the Office of Civil Rights for similar tests. Generally, they have found that the OCR's focus is on the use and functionality of screen readers and keyboards, such as tabbing through content and labeling elements. Polaris services, including our current PAC meet this threshold. The Vega suite of products regularly checks for accessibility and currently meets WCAG 2.1 AA standards.

We also ran our minimal website through an automated accessibility checker and made all the recommended updates.

### Statewide Databases

With the new statewide database package, we've reworked the consortium's group purchase of EBSCO databases. We have decided to supplement the statewide package with group purchases of Novelist Plus and [ConsumerReports.org](https://www.consumerreports.org).

### PrairieCat

PrairieCat recently added a new staff member. We welcomed Shelby O'Hara to the team as our UX Specialist in late June. Shelby previously worked at the Midlothian Public Library. She will be helping us move forward with the numerous Vega module projects that are now in progress or coming soon.

In that vein, we continue to work with Innovative to refine and configure our Vega Discovery interface. Currently we are testing member login credentials in a consortium environment. This new feature allows member libraries much more independence to configure their homepages as they would like them, make changes as they need as well as add their events or other library-specific materials as they see fit. It will also move configuration changes such as hours and dates closed from PrairieCat staff to the members themselves.

PrairieCat has also signed on to work as a beta partner with Innovative on the LX Starter product for consortiums. LX Starter is a new notification system that will allow libraries to customize overdue, holds, and billing email notices using their logos, book covers, graphics, event reminders, and other enhancements. This system is already in place in multiple stand-alone libraries; however it is just being rolled out for consortiums, and we will be one of the first to test it. We also continue to partner with Innovative to develop their Promote (marketing) software for consortiums.

In late June, we will be moving to the new Innovative phone notification system. This system replaces the current third-party system we are using (iTiva) and will be hosted by Innovative. This is one of the final things that we house in the RAILS datacenter. After we complete the move of our last server to the cloud (should be occurring shortly if not completed already by the time this is read), we will only have our firewall remaining in the RAILS location. This completes our strategic goal of moving off the RAILS IT infrastructure.

In July, I will be working with RAILS accounting staff as well as members of our Finance Committee to review and potentially update the way our budget and fees are structured. We will be examining current rules around capital reserves spending, among other things.

In June, we worked with HR Source to develop a survey of consortia nationwide to gather information on director compensation and benefits. I would like to thank my colleagues in Illinois for their responses. The results should be made available to participants in August. Although the response rate so far is less than I would have hoped, we will have a large enough sample to make the survey worthwhile. Submissions will be taken until June 21<sup>st</sup>.

Work continues to onboard our upgrading member, Mills and Petrie Memorial Library. They are a current Union Listing member, upgrading to a Basic Online circulating level of membership.

Planning for this year's online PUG Day is well underway, and a schedule of sessions will be released soon. PUG day will be held this year on September 26 and 27. More information can be found on our support site at <https://support.prairiecat.info/pug-day-conference>.

## Rock River Library Consortium (RRLC)

### Equipment Grant

RRLC closed out the fiscal year providing our members with an opportunity to receive a grant for \$3,000 to purchase new equipment and if necessary, asset tags. Asset tags could only be purchased by the schools if they had convinced their administration the circulation system to be a great way to keep track of the school's equipment loaned to students and faculty.

### Database Renewals

We renewed the subscription to the Gale databases for another year for the schools along with the new Statewide databases the State Library is providing will be great help to students. The public libraries in the consortium will be providing Brainfuse database (HelpNow/JobNow/VetNow/CollegeNow) bundle to their patrons. We decided to drop PressReader due to lack of use by our patrons.

### Staff Training

In late July, RRLC will once again hold training for staff in person at a local grade school. Recently, we have had a turnover of librarians (Milledgeville, Rock Falls High School and publics) that we felt it was important to having training again this year.

### Software Upgrade

The Library Corporation (TLC) released an update in software, and we chose to upgrade. The consortium is now version 5.7.5. TLC will be holding their annual users group meeting in October virtually again this year. They discovered that more people are able to attend virtually than in person.

## Resource Sharing Alliance (RSA)

### RSA Independence Project and Membership Updates

Phase 1 of the RSA Independence Project (RIP) will conclude on 1 July with the conversion of RSA NFP, a 501c3, to RSA, an Illinois Intergovernmental Instrumentality (III). July is also when we implement our new fee structure's fixed-price 5-year phase-in. Some libraries are seeing as high as 400% price increases.

RSA has flattened membership to one level; everybody gets everything, assuming they are trained to use it and need it.

As of 24 June, we have official notification from 6 school libraries, consisting of 12 total system branches, of their withdrawal on 1 July. In all cases it was due to the increase in membership pricing. We have 1 additional small Catholic school that is in limbo with no Administration or Librarians right now whom we expect to withdraw. Up to 5 more schools may withdraw next year due to pricing, after they figure out what to move to. We do not expect any public libraries to leave as none of them want to live without system holds.

### Board of Directors and Policy Development

Our new governing status required a new Board of Directors. We have 5 returning members from the current Board and 7 new Board members. Five of whom have never held RSA leadership positions and come from small libraries. We're looking forward to learning new thoughts and ideas on the best way RSA can serve our members!

We are developing, borrowing, and adapting Board and operational policies needed as an III. Not for profits have a very low bar on written policy, and we're working quickly to create all the policies we need moving forward. A big 'Thank You' to those consortia who have policies posted on your sites. Very helpful indeed.

### Support Site and Library Visits

Our Support Site has been updated, and will continue to be updated, to reflect our new governing status. We have many pages of committees and governance to modify into an archive. We're creating all new Board and governance pages. We expect this to be a multi-month project. We continue to update our new RSA Document Index page. We tweak this page to list all of RSA's policies, standards, procedures, guides, cheat sheets, and other information documents as well as YouTube videos and other library information. We're about a week away from posting a generalized Operations Manual to help our newer library staff understand the basics of running their library in our software. Both the Document Index and Operations Manual are intended to be the go-to information sources for libraries who experience sudden staff changes. That happens more than we'd like.

Library visits continue by Operations and Cataloging staff. We're getting great feedback during these visits and starting to confirm/teach libraries about their system settings. Turns out, our libraries have missed seeing us.

## System Wide Automated Network (SWAN)

### New Ticketing Platform & CRM

SWAN selected HaloITSM as our next ticketing and customer relations management platform. We are looking to start the implementation process this summer, with a contract starting July 1st. The onboarding process with Halo involves extensive one-on-one time with their consultants to create our workspace. Aside from ticketing capabilities, HaloITSM has modules for FAQs, a CRM, a user portal, and asset/inventory management.

The current project is to analyze incoming support tickets in order to create categories and common workflows. This will help us to determine HaloITSM's initial configuration and streamline the tool to best

serve our needs. Our goals are the ability to route tickets with increased automation without requiring libraries to pre-categorize their requests. After this information gathering phase, we will then meet with all SWAN staff to get an idea of how they would like an ideal ticketing workflow to behave and provide further insight into specific support workflows they commonly see.

### OpenAthens Database Link Audit

OpenAthens is SWAN's proxy authentication system and provides single sign-on for databases and electronic resources and protects patron privacy. SWAN has integrated keyword searching of research databases from providers such as EBSCO into our Aspen Discovery, and OpenAthens is key in providing a smooth user experience when accessing integrated e-resources. OpenAthens authentication works with many outside resources, and we are conducting an audit of libraries' database links over the next year to ensure that libraries are using the best authentication methods.

### Illinois State Library E-Resource Program and EBSCO Database Group Purchase

EBSCO was awarded the contract for the Illinois statewide e-resource program, which impacted our current EBSCO group-purchase contract, now in its 5<sup>th</sup> year, as there is some overlap between the SWAN EBSCO database package set to renew July 1st and resources included in the statewide deal. SWAN discussed the new available EBSCO package options with our members and has moved forward with 50 public libraries opting into the RAILS EBSCO flagship package deal. EBSCO has offered an additional 25% off the flagship package for those 50 member libraries.

### Enhanced Online Patron Registration

SWAN is seeking to enhance online patron registration to include identity verification and residency against library service boundaries. We have obtained estimates from third-party online registration providers, some of which have transaction fees based on the identity verification solution. We have estimates of annual card registrations to calculate per-transaction fees for patron verification tools. We are still analyzing this material and will share our findings at the July board meeting. We believe providing a robust patron registration solution for all 100 libraries in SWAN will help resolve many complications through verifying precisely which home library is the residence of an online user seeking a library card.