

Consortial Reports

October 21, 2024

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

CARLI Governance Board

The CARLI Governance Board endorsed a [Statement on the Importance of Librarians in Academic Libraries](#).

The CARLI Annual Meeting will be October 22, 2024, in Champaign. CARLI holds an Annual Directors Meeting on the same date.

I-Share

As of August 2024, resource sharing is now available for the five libraries added to I-Share in June 2024. Those libraries are Chicago Theological Seminary, City Colleges of Chicago, College of Lake County, Elgin Community College, and Prairie State College.

CARLI implemented [Alma Anonymization](#) without issue in July 2024 (wrong date in last report).

New Member

Henry S. Olcott Memorial Library, Theosophical Society in America

Staff

In October 2024, CARLI will have a new staff member to fill our open electronic services coordinator position.

CARLI will be hiring an additional staff member this fall to fill a new position whose primary responsibilities will be to support I-Share Libraries.

Collections

The Digital Public Library of America is in the process of selecting a new home for their cultural heritage metadata aggregation project, of which the Illinois Digital Heritage Hub (IDHH) is a service hub. An announcement is expected this fall. Aggregation services will continue throughout the transition. IDHH will be represented at the Illinois Library Association Conference and at the Association of Illinois School Library Educators Conference.

Continuing Education

More than 300 people attended the Free People Read Freely Symposium, a two-day event co-sponsored by the University of Illinois System, CARLI, and the University of Illinois Press. The event was held at the Krannert Center and I Hotel and Illinois Conference Center August 20-21.

CARLI has announced [CARLI Counts](#) Cohort 6.

CARLI will serve as co-host along with Atla, Illinois Heartland Library System, Reaching Across Illinois Library System for the International Coalition of Library Consortia (ICOLC) Conference being held in Chicago on May 4-7, 2025.

Grants

CARLI, along with the University of Illinois Urbana-Champaign Library, has been awarded a \$143,489 LB21 IMLS Planning Grant to plan a national continuing education program to develop academic library workers' assessment skills. The Consortial Collaboration for Academic Library Leadership Success (CCALLS) will be based on the successful CARLI Counts program for assessment training.

The Professional Development Alliance, of which CARLI is a member, was awarded a Laura Bush 21st Century Librarian Program planning grant to design, pilot and assess a BIPOC Leadership Academy for Support Staff (BLASS) library supervisors without MLIS degrees.

EResources

CARLI EResources staff are working on the implementation of Consortia Manager for the fall calendar year 2025 selection cycle.

Cooperative Computer Services (CCS)

New Members

Mount Prospect Public Library and Waukegan Public Library are now circulating on Polaris. Over the past quarter, CCS was focused on training, data testing, and configuration with the new members. As the libraries settle into their new routines, we will offer post-go-live training focused on reports and other advanced features.

The Vernon Area Public Library has requested membership in CCS. The CCS Executive Committee has voted to recommend their membership to Governing Board. We anticipate confirming their membership in November 2024 and beginning implementation with a Fall 2025 go live.

Staff Member Retirement and Recruiting

Virginia Seward, Data Services Librarian, has announced her retirement after over 25 years of service to the CCS community. She will retire at the end of December.

CCS has posted an opening for a Member Services Associate. We are hoping to bring someone onboard before the end of the year so that they may benefit from some time with Virginia.

www.ccslib.org/employment

Find More Illinois Implementation

26 CCS members are now live on Find More Illinois. Due to some functionality issues, a handful have chosen to limit lending until the issues are resolved.

Discovery Layer Investigation

Our recently-announced user experience testing of discovery layers is the first of multiple phases that will lead us to Governing Board selecting a discovery layer in May 2025.

- Phase One: User Experience Testing
- Phase Two: Scoring and Data Synthesis

- Phase Three: Vendor Demos/Presentation
- Phase Four: Governing Board Decision
- Phase Five: Negotiation and Implementation

September – November

Patron Usability Testing of:

- PowerPAC
- Vega Discover
- Bibliocore
- Aspen

Gayatri Shah will lead a multi-pronged testing program to evaluate usability, accessibility, task completion efficiency, user satisfaction, and overall experience of each interface.

November-December

Gayatri Shah will analyze testing data to score all interfaces. Synthesize data into competitive analysis and UX report.

January-March

CCS staff will conduct additional research into high-scoring tools, including vendor demos and reference checks. Some demos or presentations will be open to interested member library staff. We will also request preliminary pricing.

March-April

CCS staff will analyze all collected data and develop a presentation and recommendation for Governing Board.

May 2025

Governing Board directs CCS to pursue a specific discovery layer. The negotiation and implementation timeline will depend on the selected tool (for example, an Innovative-owned tool would be included in our III contract negotiations and implementation would be a different timeline than an external tool). If selected, implementation of an external tool would target to complete by March 2026 to align with our III contract expiration in May 2026.

ILS Environmental Scan

In advance of our Polaris contract expiration, Debra Wischmeyer is conducting an environmental scan of the ILS landscape. During this project she will:

- Conduct an environmental scan of ILS options in the second quarter of fiscal year 2025
- Survey CCS member library staff to gauge satisfaction with Polaris tools
- Collect consortium customer references
- Deliver a report and recommendation to Governing Board no later than February 2025 including:
 - Recommendation to renewal with Polaris or go to RFP
 - If renewing, contract priorities and recommended term

Pinnacle Library Cooperative

Resource Sharing Efficiency

Last year, as part of our strategic plan, we adjusted the holds routing settings in our ILS to mirror the order of the RAILS delivery route. Since all of our libraries are on the same route, libraries can presort their delivery bins, allowing some items to be picked up and delivered on the same day, without the need for going back to the RAILS service center. The adjustments to the picklist were done to maximize this arrangement as much as possible.

In the 12 months following the change:

- The average time to fill a hold from a picklist has decreased by 7%.
- Among holds that ship between two libraries, the number of requests made available in less than 24 hours from the hold creation date more than doubled (+ 125%)
- In total, 39% of holds shipped between libraries are available within 48 hours of the hold creation date. (up from 32%)
- On average, holds placed on Wednesdays and Thursdays are now filled 10-12 hours faster than before. This is likely the result of activity that can now be filled before the weekend. Since there is no delivery on the weekend, holds placed later in the week generally take 1.5 days longer to fill.

Polaris 7.6 Upgrade

In August, we upgraded to Polaris 7.6. The upgrade gives us a new way to bulk-waive fines and continues the progress on getting Tech Services into the web-based application. Future updates coming in 2025 hope to finish this work and start the process of bringing System Administration functions into the web.

Baker & Taylor Acquisitions API

Pinnacle is currently beta testing a new acquisitions API that connects Baker & Taylor's ordering platform with the library's ILS, which brings some major improvements to the acquisitions workflow. Once configured, library staff will have the option to order materials directly through B&T's website. The acquisitions API will then automatically perform all of the necessary steps in the ILS including: (1) Download a file of MARC records, (2) Import the MARC records into the the system, (3) Create the Purchase Order, (4) Create Item Records, and (5) Mark the Purchase Order as "ordered." This functionality has the potential to save a ton of staff time on the acquisitions side of things and we are very optimistic about the development.

National Change of Address Cleanup

Last month, Pinnacle sent its patron database to Unique Management to compare against the National Change of Address registry. We do this cleanup for the entire system every four years. In this year's batch, approximately 10.4% of patrons were found to have a new address, which is in line with their usual findings. These accounts have been blocked and libraries have the option to remove inactive accounts.

In addition to address change information, Unique also provided geographic coordinates and census tract information for the remainder of our patron database. Pinnacle is currently exploring options related to mapping patron activity based on this data.

Remote Work

Pinnacle staff have started working remotely one day a week. Remote work has always been a part of Pinnacle's staffing (before/after meetings, off-hours support, weekends, etc.), but it's never been a component of our regular schedules as it has been for others. We're starting with one day a week, but may adjust as needed in the future. We remain in-office at the Crest Hill Library for the remainder of our schedule.

PrairieCat

This year, PrairieCat hosted its 10th annual PUG Day on September 26-27. This year was held online, as our board has decided to alternate between online and in-person conferences. The 2024 PUG Day consisted of 15 sessions, with a combined attendance of 603. Five sessions were hosted by PrairieCat library members. Next year's PUG Day will be held in the Quad Cities area. PUG Day is open to any RAILS library staff who wish to attend and is free of charge. This year's sessions included:

- Using Excel to Create an Interactive Library Statistics Dashboard
- Adult Programming: Why Should Kids Have All the Fun?
- Booktalk Your Way to the Friendliest Library in Town
- Library Budgets & Finances 101
- Creating a Local Author Showcase
- Demystifying Genre
- iLEAD Trustee
- Resource Sharing Updates from RAILS
- Community Connection: All-Ages Programming on a Tight Budget
- Censorship Is Not Going Away: Protecting Library Collections, Engaging Community, and Recognizing the Impact of Library Work On Mental Health in the 2020s
- Artificial Intelligence and You: An AI Primer for Library Workers
- CMC: Connecting Your Community to Your Collection
- What's New with Innovative, Sierra, and Vega Discover
- Book Hospital
- Enhancing Your Email Notices - LX Starter for Consortia

In addition to PUG Day, PrairieCat continues to refine our Vega Discover platform, in conjunction with Innovative and volunteers from member libraries. Currently we are working with Innovative to develop their staff interface that will allow each library to design their own catalog homepage and update their information as they see fit. We should shortly be launching our new PrairieCat Kid's Cat, as well. Work also continues with the LX Starter notices product; however, given our large size this has presented us with some unique challenges.

One fully participating library, Maple Park Public Library, has notified us that they would like to "step down" in membership level to Basic Online. Given they are within the parameters of qualification for that level, we will be asking Delegates Assembly to approve their request at their October meeting.

PrairieCat just completed an analysis of the PrairieCat website in light of accessibility requirements and is in the process of correcting areas of concern. The overview was performed by our website developers, The Cherry Hill Company. Cherry Hill is also nearly finished with the member forums portion of our website, which we have been planning for quite some time. This feature will allow library staff to

exchange information and have conversations around areas of interest and concern. The forums will be integrated into the member interface of our support website.

PrairieCat is also in the process of reviewing options for our mobile app in the coming year.

Rock River Library Consortium (RRLC)

No report available at this time.

Resource Sharing Alliance (RSA)

Now that RSA has converted to an Illinois Intergovernmental Instrumentality (III), we're deep in the weeds of finalizing that at all levels. Federal and State agencies, our many vendors, associated group purchases and more. The main take-away is that it's much cheaper overall to be a 501c3 than to be a governmental agency! But remaining a Not for Profit wasn't good for our long-term overall health and for staffing purposes.

We've also begun the work of getting everything ready to directly employ staff in RSA. We're talking with a couple consultants right now and will have this finalized by mid-October. Once we have professionals covering all the bases for us, we'll really get moving on this process. One thing we're already hard at work on is developing RSA's new multi-level departmental positions. Right now, we have one level of position for non-supervisory staff in each of our two departments. That has led to staff members departing for higher level positions in the past. The concept we're moving forward with is developing 3 levels of responsibility for each department, with the current position being the middle level. This provides a path for upward mobility inside RSA and the lowest level would allow us to hire staff at lower levels of experience and grow them inside our organization.

As part of the process working with all our libraries to approve the governance conversion and our new fee structure, we found a wide-spread issue. Our member libraries know that we're very busy and they had really pulled back on contacting us. They didn't want to "bug you with our small issues." Researching this surprising phenomenon we found that libraries were using the system in various creative ways to around the system to allow them to sort-of do the thing they wanted rather than having us adjust the system to work FOR them. For example, we found over 20 libraries who had become fine-free but never told RSA so we could make the system stop charging fines on patrons. No big deal our members would say, we just forgive the overdues and use fine-free discharge, what's the big deal? The revelation that this was widespread led to the following new programs.

Parameter Parties! Not the fun eat cake kind of party, but a party none-the-less. We developed a 50+ question review of all the library's current system settings, report settings, notice reports, website settings, patron profiles, cataloging options and more. Our staff do two or so hours of research per member upfront, then visit the member virtually or in person and ask them how they use the system, while comparing what the system is actually configured to do. Each Parameter Party generates anywhere between 5 and 25 individual help desk tickets post meeting as we fix anything we find, update the system to make it work better for our members, and do a lot of clean up.

FYI, I'd suggest giving this idea a look in your consortia. COVID and the associated staff turnover caused huge drifts in ILS system usage. We've found even our biggest members had several things they didn't know we could help them do or how easily we could tweak the system to work better for them.

We also developed a multi-prong “Bug Us” campaign. One part of the campaign has its own adorable bug mascot, some suggested things to bug us about depending on what department or type of campaign part we’re advertising, and all our contact info. No really, we WANT you to bug us! We’ve released the first overall “Bug Us” materials, just this week we ordered the Cataloging department’s “Bug Us” materials, and we just finalized the RSA Board’s “Bug Us” business cards. We’ve got 2 more campaigns in the hopper for the remainder of the fiscal year. The increase in questions and feedback from libraries was almost instantaneous with the launch of the first campaign so we already consider it a success.

We continue to update, streamline, and improve findability on the RSA Support Site. Our members are finding the updates, particularly our new fully indexed listing of all RSA documentation, grouped by topic, and our new Operations Manual. We’ve started work on School member specific pages and a School Operations Manual now. Staff turnover in schools means we need to ensure they have the most direct level of discovery.

Our Cataloging Department revised our 3-day, 6 hour long Basic Cataloging course down to a single 4-hour session. The first teaching of that course went well, and we believe it will lead to increased attendance. They continue to visit 3 or 4 members a month to do on-site cataloging visits. These visits are more free style than the Parameters Parties and are designed to help each member with whatever issues in cataloging they may have.

All-in-all, RSA made 57 member visits in July, August, and September, well over half of which were in that member’s library. Our goal is to visit each of our 135 members by the end of the fiscal year, then at least once every two years after that.

[System Wide Automated Network \(SWAN\)](#)

[Aspen Discovery 501c3 & Governance](#)

The Aspen community is starting the step to create an independent non-profit organization. This is not unlike the creation of an official independent user group such as IUG or COSUGI, but it will be a much larger umbrella where libraries and companies providing support and software development will work together to support the Aspen Discovery Project.

The Aspen Discovery Project is a library open-source software platform licensed under the terms of the GNU General Public License. The Aspen Governance Task Force is collectively charged with creating a proposed governance model for the Aspen Discovery Project. Governance is to ensure the long-term technical and financial sustainability of the software, its documentation, and its development processes. Aaron Skog from SWAN will lead this task force which intends to release a recommended governance model in early 2025.

[SWAN Expo 2024 recap](#)

The annual SWAN Expo event held on August 23, 2024 at Moraine Valley Community College Business and Conference Center had 227 staff from 52 attending libraries. This year was our 50th anniversary and it included a closing session where we predicted what SWAN will be like in the year 2075.

Sessions from this year included:

- Keynote: From Confusion to Confidence: Improving Mental Health Crisis Intervention (NAMI)
- RAILS delivery: Bins, bags, and beyond! (RAILS)

- Library newcomers & the immigrant experience (Chicago Public Library)
- MobileStaff consultation: bring your library device or learn about how to enhance your tablet experience
- BLUEcloud Analytics Q&A for public services
- Crisis plans from an HR perspective (HR Source)
- School partnerships: Issuing student cards
- BLUEcloud Analytics Q&A for technical services
- Basic copyright for library staff (University of Illinois)
- Utilizing the Illinois Digital Archives (Illinois State Library)
- Local records management (Illinois State Archives)
- BLUEcloud Analytics basics
- Aspen for library staff
- Collection management: Weeding, storage, renovations
- Roundtable: Staff development, library in-service days, & what libraries do for fun
- Roundtable: Self Care in the Balance of Work & Life (NAMI)
- Roundtable: How to deal with difficult service scenarios
- NAMI consultation session
- Circulation best practices: Moments at the service desk
- Be a WorkFlows detective: Following clues to unravel confusing service scenarios
- The 2024 State of SWAN
- SWAN in the year 2075

New ticketing platform & CRM

SWAN selected HaloITSM as our next ticketing and customer relations management platform. We are expecting to go-live with our member libraries at the start of 2025. 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.

Illinois State Library E-Resource Program & EBSCO database group purchase with RAILS

50 SWAN public libraries elected to move its EBSCO group purchase to the RAILS EBSCO flagship package. This arrangement dropped from 84 participating libraries to 50, with the remaining libraries opting for the statewide EBSCO package. SWAN provided direct resource links for both EBSCO packages to its member libraries. These URLs are integrated within our remote patron authentication platform OpenAthens. Additionally, the appropriate EBSCO resources are integrated within our Aspen Discovery keyword search engine.

OpenAthens is SWAN's proxy authentication system and provides SAML based 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 have recently completed an audit of libraries' database links to ensure that libraries are using SWAN's provided authentication. With the expected end of IP-based authentication methods within the current web browsers available, using OpenAthens will ensure libraries can provide uninterrupted access to research resources.

Enhanced online patron registration

SWAN will be moving forward with enhanced 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 shared our findings at the July board meeting and presented the concepts to library directors at our September quarterly 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. Through a SWAN consortium-wide solution, residents will be directed to their home library and be provided with a full-service library card without having to mediate card sign-up in the library or be provided with a limited online card.