Agenda Item 6.2
125 Tower Drive
Burr Ridge, IL 60527
630.734.5000
630.734.5050
railslibraries.org

Consortial Reports

April 21, 2025

Consortium of Academic and Research Libraries in Illinois (CARLI)

Administration

- CARLI staff are currently collecting updated membership, I-Share, and digital collections agreements from all CARLI Member Libraries.
- The CARLI Governance Board annual election is taking place.
- CARLI has submitted its FY26 proposed budget to the University of Illinois System Office for review. The budget modeled reduction scenarios for FY26 – FY28 as requested by the University of Illinois System Office.
- **CARLI Committees:**
  - The Archives Task Force will be a standing committee as of July 1.
  - CARLI has issued a call for volunteers for CARLI committees for terms beginning July 1.

I-Share

- Applications for new I-Share libraries will be available in FY26 pending the execution of the amendment to renew for the final three years of the agreement with Ex Libris/Clarivate.

CARLI Statements on Academic Librarianship and OER Funding

CARLI has two statements available on its website for institutional and personal endorsement.

- Statement on the Importance of Librarians in Academic Libraries
- Statement on the Need for Funding for Open Education in Illinois

CARLI Scholarship

Applications for CARLI's Scholarship are due June 1. The CARLI Scholarship provides financial assistance to current employees of CARLI Governing Member Libraries pursuing graduate studies leading to a Master's Degree in Library and Information Science at the University of Illinois at Urbana-Champaign. Scholarships may be awarded for both on-campus and/or distance education programs.

Continuing Education (partial list)

- CARLI, RAILS, IHLS, and NILRC will host a webinar on **Consortial Ebook Offerings** on April 28 from 2:00 -3:00 p.m.
- CARLI along with Atla, IHLS, and RAILS will host the International Coalition for Library Consortia Annual Meeting on May 4-7 in Chicago.
- **Building Digital Archives with Minimal Staffing**

The CARLI Archives Task Force is pleased to host this two-day online program on May 14–May 15, 1:00–4:00 p.m. on each day.

- CARLI, Illinois State University, and Illinois Wesleyan University are pleased to host **ACRL Assessment in Action: Demonstrating and Communicating Library Contributions to Student Learning and Success**. The roadshow will be held on Thursday, June 5, 8 a.m.–5 p.m., at the Illinois State University Alumni Center.

Cooperative Computer Services (CCS)

Vernon Area Public Library Addition

The VAPL addition has kicked off and we are currently working with the library and Innovative staff to complete data mapping and the branch build in Polaris. The test data load is scheduled to begin in late April.

MARCIVE Replacement

CCS is moving forward with Backstage Library Works for MARCIVE service replacement. R. Fischer is working with Backstage to set up our rules and practices to ensure a smooth transition.

Find More Illinois

Draft of FMI/OCLC Comparison Dashboard

R. Barth has been working with R. Fischer and K. Lyons on a Find More Illinois/OCLC comparison dashboard. Barth and Lyons are working to resolve a discrepancy with OCLC data.

In addition to this data, CCS is tracking any changes in borrowing/lending patterns as FMI membership changes and will work with library staff to estimate staff time required to manage requests in each platform.

Unavailable Copies Issue

On March 18, Autographics attempted a solution to the ongoing issue allowing unavailable copies to be requested through Find More Illinois. The fix was unsuccessful. CCS, RAILS, Autographics, and Innovative will meet in April to discuss next steps.

Innovative Users Group

CCS staff attended the annual Innovative Users Group conference. M. Landers presented **From Feedback to Focus: Crafting Responsive Training for Library Staff**. Shared CCS methods for balancing quantitative survey data with qualitative insights to develop relevant, timely training initiatives and gave practical strategies for attendees to adopt within their own training programs. R. Fischer led a preconference called **From Simply Reports to Bulk Changes: Reports and Correcting Errors in the Catalog** covering Simply Reports for Cataloging and Serials and Records sets and Bulk Changes in Leap.

Data Analytics Tool Evaluation

After evaluating several potential vendors from across the library and government markets, CCS met with LibraryIQ and OrangeBoy in March. Each vendor received a document outlining our anticipated needs to guide their demonstrations. CCS staff scored each vendor on:

- Functionality
  - User/Account administration
  - Data Options
  - Data Visualization Capabilities
  - User Interaction
  - Data Handling and Privacy
- Implementation & Support
- Vendor Information

Orange Boy's Savannah better meets CCS's needs in that it looks at all areas of library operations while LibraryIQ is more focused on collection analysis and less customizable. CCS is conducting additional research to ensure Savannah can meet our needs and provide value to our members before moving forward.

Discovery Interface Comparison Project

In March, G. Shah led several initiatives to move the discovery layer evaluation forward. Each of the following will be factored into CCS's final report and recommendation to Governing Board, along with previously completed user testing.

- Vendor Demos
  - Bibliocommons, Bywater Solutions, Grove, and Innovative Interfaces were invited to provide front- and back-end demos of Bibliocore, Aspen, and Vega Discover. Aspen is an open source discovery solution—Bywater and Grove are both service providers that would be potential partners for CCS. The front-end demos by Bibliocommons, Bywater, and Innovative were open to interested library staff.
  - CCS staff and Database Management members scored front-end demos and other member library staff were invited to submit survey feedback. CCS staff also scored back-end demos.
- Search Exercise
  - CCS staff conducted a comparative search exercise to review the performance of each catalog based on recently popular search terms.
- Reference Checks and Customer Calls

G. Shah and R. Malinowski will work on a cost and value analysis before completing the CCS report. We anticipate sharing a draft report with Database Management in April and consider their feedback in potential revisions before May's Governing Board meeting.

Strategic Planning

The planned February planning retreat was rescheduled to March due to weather. At the March planning retreat, Governing Board used three activities to refine potential priorities identified in the November 2024 planning survey. The Long Range Planning committee will meet in April to review the priorities identified at the March 2025 planning meeting as well as existing CCS commitments and priorities. The committee will also review the strategic planning timeline, which calls for a plan to be presented at May 2025 Governing Board. In light of the rescheduled planning meeting, this may change.

Pinnacle Library Cooperative

New Learning Platform- May 1

Our new Learning Platform for library staff, Coassemble, is set to launch on May 1. Pinnacle staff have spent the last several months reconfiguring our training content to take advantage of the platform's "micro-learning" features. At launch, we will have 12 courses available and will continue to add courses throughout the year.

The platform allows staff members to create an account to save their progress. Managers can be given additional permissions to track the progress of their employees on the platform or assign courses to

specific staff members. Member libraries also have the ability to create and host their own library-specific training through the platform.

B&T Acquisitions API

For the past several months, we've been beta testing new acquisitions functionality with Polaris that dramatically streamlines the Acquisitions process. Once configured, the Acquisitions API allows library staff to submit an order from Baker & Taylor's website that automatically creates a Purchase Order, Bibliographic Records, and Item Records directly in Polaris, saving significant time for Acquisitions staff.

Coordinating with B&T and Innovative, we've worked through various implementation-related obstacles and have submitted several successful orders. We're now ready to begin deploying this with the rest of our libraries that are interested. Innovative plans to coordinate with other vendors to take advantage of the new endpoints.

IUG Conference

Both Pinnacle staff members attended the Innovative Users Group conference last month in Denver, CO. Matt presented as part of a group discussing customizations to the Vega Discover catalog. Brittany hosted members interested in joining the Wisconsin-Illinois Innovative Users Group (WILIUG).

Next year, the IUG conference will be in Chicago in April.

PrairieCat

PrairieCat has been busy with many activities over the course of the last few months. Please see below for some highlights:

Governance

- PrairieCat's Strategic plan for the next three years was approved by the Administrative Council at their meeting on April 4.
- PrairieCat's revised Financial Emergency Sustainability Plan was finalized and approved in March.
- The final draft FY26 budget and fee schedule was reviewed by the Finance Committee, Administrative Council, and will be going to Delegates Assembly for final approval on April 30th.
- We are in the final stages of revising our in-person quorum requirements for Delegates Assembly and the Finance Committee. On examination, PrairieCat encompasses over 4,500 square miles of service area. According to the existing statutes, we are large enough to qualify for the exemption which would allow us to meet at determined remote locations, as RAILS does. The needed bylaws changes will go to the Delegates Assembly in April.
- A new mobile app contract is under review, after a lengthy analysis of appropriate vendor products and several demonstrations.

Member Services and UX

- Member Forums were launched on the PrairieCat website. It is an online forum intended for peer-to-peer discussion around library services and to promote member engagement.
- The Engagement Committee is planning for in-person PUG Day in September. The committee is finalizing guest speakers and accepting program proposals from members.

- PrairieCat staff continue to host a New Directors Welcome meeting to connect with new directors. Staff are also completing member site visits within our service area.
- The Resource Sharing Committee and staff organized the upcoming Resource Sharing Summit. This in-person event will feature several guest speakers and focus on Marketing Your Library: Strategies for Success and Accessibility.
- Online training courses for Vega Site Admin and Homepage Builder User Roles were launched. This allows library staff to manage and customize their own Vega sites including branding, links, and custom content on the homepage. PrairieCat staff are providing online office hours for members around this topic.
- PrairieCat staff are testing ecommerce integration in Vega Discover and plan to implement that in the coming weeks.

IT/Systems

- Systems staff helped set up reporting in Google Analytics on the PrairieCat support site to get a better idea of what libraries are looking for/using.
- Systems staff reviewed and tested backup procedures while investigating possible cost-saving measures.
- Staff are investigating an issue with Simplelist causing duplicate emails.
- We tackled multiple receipt printer issues stemming from the new Sierra update and worked with third-party IT support to address a conflict between Sentinel1 antivirus and Sierra.
- Throughout the quarter, we closed out 142 support tickets.

Library Services

- Over the past quarter, Library services participated in a variety of key meetings, including those with PrairieCat Staff, weekly department meetings, the Training Committee, the Technical Services Committee, the Circulation Committee, Vega Strategic Partners, the L2 Governance Group, OCLC webinars, and the Delegates Assembly.
- Library Services staff conducted multiple training sessions, including one-on-one sessions via Zoom. Additionally, several courses offered through Talent LMS have been revised and refined. Several staff members from our member libraries have successfully completed courses and achieved Item Entry certification.
- The team has processed numerous original cataloging requests, merged duplicate records, overlaid records, created volume entries, and linked items to their corresponding volume records. We have also managed the submission of records from various libraries through the PrairieCat bib-loading process, ensuring the accuracy and completeness of the database.
- We held meetings with representatives from Mills and Petrie Library to discuss training and procedural requirements in preparation for their "Go-Live" event, scheduled for May 19.
- We have been in discussions with Mitinet as a potential replacement for MARCive to enhance our database record updates and ensure ongoing standardization.

Rock River Library Consortium (RRLC)

This quarter we finished a new contract for our members to sign and return. We decided to update the contract due to verbiage no longer needed (ex. purchasing of new servers). We submitted a grant to RAILS to hopefully expand our consortium with the addition of Chadwick Public Library (Fingers crossed).

Members also decided to establish a reserve fund with some of our excess funds. They voted to establish an account with Illinois Funds, since they had a higher interest rate than the local banks. They also voted at the end of each fiscal year to move a percentage of remaining funds to the reserve fund. The consortium is trying to be responsive to our ever-changing environment.

Next quarter we are looking at database clean up either hiring a part-time cataloguer or an outside vender to remove duplicates, expand on-the-fly records to full marc records and to highlight problem records that need local cataloguing.

Resource Sharing Alliance (RSA)

Independence Update

In late February we learned that our EIN, which we were told would not change, is changing. Further, this change must be made as a paper request rather than online per IRS regulations. As I'm sure you can imagine, the unknown nature of our EIN number quickly became an issue for hiring staff as we can't finish setting everything up.

RSA and RAILS had a hard deadline of late March to make the decision on the final transition date due for two reasons; 1) the budgeting processes of both organizations needing clarity by late March and 2), the hiring timeline for 1 July needed to start in early April. Last fall we included a backup staffing transition date for unforeseen issues in our submission for the RAILS LLSAP Support Grant. In March, RSA and RAILS jointly determined that it is in the best interests of both organizations, and current RSA Support Staff, to move the staffing transition date from 1 July 2025 to 1 January 2026.

The decision allowed RAILS and RSA to budget appropriately and move forward with our internal processes. We're continuing to move forward with LIMRiCC, IMRF (where we're being processed for our payment rate), MissionSquare, and other vendors to do as much as possible without a firm EIN. On the plus side, the January staff transition lines up better with many benefits program start dates. We anticipate being finished with everything well before the start of the formal hiring process at the end of September and the October job postings of any positions we need to fill. We know for sure that we need to hire for two positions, an Office and Marketing Coordinator and a Library Systems and Data Analyst. Both will have 2 January target start dates.

Other Updates

RSA is moving off individual, but RSA managed, Gmail accounts. Google's recent and upcoming changes have made it difficult to manage these accounts and the upcoming QR code 2 factor settings will effectively end multiple users in libraries. RSA has procured and set up IONOS emails for all branches in our system. These will be for RSA internal email only, not for patrons or vendors to contact libraries. We are moving all the system emails and end of month report emails over to these accounts 28 – 30 April.

We will then 'release' the current RSA managed free Gmail accounts to the libraries and help them set up the emergency contact information.

Our Operations Department is reaching the end of visiting each of our members to do a Parameter Party. We've done all our public libraries, and 2/3'rds of our school, special, and academic members. We expect to be finished with these by the end of June. We'll then roll into in-person library visits to each member and branch once every 18 months. The Parameters Parties have generated about 700 help desk cases to correct things we found during the parties. 98% of those cases have been resolved in conjunction with the member library.

Both the Operations and Cataloging departments are revising our oldest, or problematic, documentation. Now that our documentation index is complete and we have a full picture of all the guidance RSA has provided over the years, we're finding many areas to beef up, or refine. For example, we're working on consolidating about 18 documents and policies on holds down to one policy and one overall guide on holds. It's nice to move from reactionary documentation to planned, carefully considered documents.

The Cataloging Department contracted from 4 catalogers and a supervisor to 3 catalogers and a supervisor in February. We've decided to eliminate the position moving forward and reallocate the funds to fill the new Office Adm/Marking position. This required shuffling of assigned areas of expertise, and the staff have begun cross training other staff so that all staff can work on all cases. We've eliminated topical POCs and moved to SME's providing guidance so that everyone has a fuller breath of knowledge.

Shoutout to the CMC is making great progress on our cataloging backlog project, updating encoding level M records to full MARC records. There are only 161 cataloging requests remaining to be processed, with the oldest submitted in December 2018. There were several thousand at the beginning of the project. CMC expects to finish the backlog by the end of this year.

All staff have, or will be shortly, working on RSA Day (10 April) session helpers or covering the "Ask RSA" table. This year we have about 150 staff signed up to attend sessions and share their experiences. Again, travel budgets being cut affects our attendance at a remote event.

RSA made 50 in-person or Zoom member visits, training events, and governance events in the first quarter of the year. We continue to try to hold training events in member libraries but find that we're having a hard time getting staff from other libraries to attend. COVID really killed the culture of attending meetings anywhere but in their own library or on Zoom.

System Wide Automated Network (SWAN)

Platform satisfaction survey
SWAN has completed its second annual membership satisfaction survey on the seven library service platforms provided to member libraries.

1. WorkFlows staff client
2. BLUEcloud Analytics reports & data analysis
3. MobileStaff tablet application
4. Aspen Discovery catalog
5. Mobile app, aka Library Discovery Application, aka SWAN Libraries +

6. MessageBee notifications
7. OCLC WorldShare & WorldCat

The responses from 75 libraries and detailed comments are being analyzed and will be presented to the SWAN membership at the June 5th Quarterly meeting of library directors and administrators. This year will be the first evaluation of the mobile application.

Patron Point is selected for SWAN Online Patron Registration

SWAN has signed an agreement with Patron Point to build an online registration application for all 96 public libraries. This online platform will be a single interface for obtaining a full library card and will utilize address and identity verification, as well as library geographic boundaries. The go-live for this service has not been set yet but we expect to begin a pilot program in the summer.

Aspen Discovery & Mobile app hosting provider change

SWAN migrated its Aspen Discovery server and mobile app (Library Discovery Application, aka LiDA) to a new support and hosting provider Grove for Libraries. Due to Aspen's open-source licensing, there are now additional support and hosting opportunities available. Our new hosting provider Grove has a press release about the change for SWAN.

Single sign-on integration

Our project to integrate SWAN's web platforms under a single user login and password is underway. SWAN has switched the Community Forums to the single sign-on. SWAN's new helpdesk system HaloITSM will roll out in May with the single sign-on feature.

Monthly Patron Record Purge moving to 5 years inactivity

SWAN has utilized an automated process for removal of inactive patrons from the integrated library system. There are established criteria used to remove patrons with a last activity date of 7 years which will move to 5 years inactivity starting in April. This is the final step in a long-planned process to increase the inactivity threshold each year. This approach of automating the removal of old user records streamlined our previous bespoke process of user records removal. For example, in January we purged 4,246 inactive patrons, and in February 2025 3,462 inactive users were removed from the database.