Agenda Item 6.2
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Consortial Reports

July 21, 2025

Consortium of Academic and Research Libraries in Illinois (CARLI)

Anne Craig, CARLI Senior Director, will retire from CARLI in December 2025.

CARLI Governance Board

- CARLI Governance Board meetings for the upcoming year are September 19, 2025, December 5, 2025, March 6, 2026, and June 12, 2026.
- Rachelle Stivers (Heartland Community College) is the Governance Board chair for July 1, 2025-June 30, 2026.
- New CARLI Governance Board Members
  - Term: July 1, 2025-June 30, 2028
    - Michelle Boule Smith (North Central College)
    - Marlee Graser (Southern Illinois University Edwardsville)
    - Terra Jacobson (Moraine Valley Community College)
  - Term: July 1, 2025 – June 30, 2027
    - Brian Keith (Eastern Illinois University)
  - Term: July 1, 2025-June 30, 2026
    - Jan Figa (Governors State University)
    - Dennis Krieb (Lewis and Clark Community College)
    - Amanda Pippitt (Millikin University)

Members

- Lewis University and St. Augustine College have merged.
- Theosophical Society of America is no longer a CARLI member.

I-Share: Deadline for applications for new I-Share libraries is August 1.

CARLI Scholarship

- The CARLI Scholarship Committee has selected recipients for the 2025-2026 school year. The recipients are: Allison Barrows, Southern Illinois University Edwardsville; Kaitlyn Godsil, Knox College; Joanna Kulma, Northern Illinois University; Brandon Neary, College of DuPage; Elynnor Sandefer, Newberry Library; Ailyn Trujillo, Harper College; and Alexandria Vlahos, Lewis and Clark Community College.
- The scholarship is funded by donors who have generously supported this important program, helping CARLI to grow the profession.

Continuing Education

- CARLI is hosting the **Soaring with Open Educational Resources: Furthering the Role of Cooperative Development in OER** on July 29-30 in Champaign.
- CARLI Annual Meeting will be October 21 in Champaign.

Collections

The CARLI Member funded Ebook Program will include in its FY26 Access Collection titles from Wiley, Oxford University Press, and the University of Illinois Press. At the end of the Access Period, July 1, 2025 – June 30, 2026, CARLI selects titles for perpetual access for all CARLI Governing Members.

EResources

There was a 4% decrease in the total spending on database subscriptions for FY26 due in part to databases that are now covered by either the State Library or CARLI.

Cooperative Computer Services (CCS)

Strategic Plan 2025-2030 Approved

The CCS Governing Board approved our new strategic plan, available at
https://www.ccslib.org/governing-documents

New Position: Manager of Analytics and Technology

CCS is recruiting for a new position, Manager of Analytics and Technology. This position will oversee our data analytics and user research activities and provide valuable insights to our members. Learn more at https://www.ccslib.org/employment

Once in place, this person will lead the CCS implementation of Savannah and related activities.

Vernon Area Public Library Addition

The VAPL addition is moving along. VAPL staff are in the midst of training, data testing and configuration.

Backstage Library Works Implementation

CCS processed our base file with BSLW in June following the loss of Marcive's services. We have some cleanup and additional testing to do before beginning quarterly updates.
and Records sets and Bulk Changes in Leap.

Discovery Interface Comparison Project

CCS has not yet determined which discovery layer we will use moving forward. In May, the Governing Board voted to clarify that whichever interface is selected will be for all members' use and included in CCS membership fees. Members who choose to use an alternate interface would not receive any discount on services from CCS and limited support on their platform of choice.

Pinnacle Library Cooperative

Circulation Standardization

We continue to move forward with our Strategic Plan initiative to streamline circulation practices and eliminate barriers for patrons. In May, the Governing Board approved the latest round of recommendations:

- **Patron Expiration Dates** - All libraries will now adopt a consistent 4 year Expiration Date for new patrons. This aligns with our procedure for doing an National Change of Address cleanup, which we perform every 4 years.

- **Patron Blocking Threshold** - The patron blocking limit has been increased to $50 for all libraries. This will restore access for many patrons and will prevent situations where patrons could access resources at one library but were blocked at another.

- **Loan Period Consistency** - Loan Periods in the ILS will be standardized so that checkout lengths will be determined by the transacting branch. Previously, AV materials from other libraries could have varying loan lengths depending on specific circumstances.

LX Starter

Our first library has gone live with LX Starter - Innovative's replacement product for the standard ILS notices. LX Starter uses a modern web interface and a WYSIWYG editor, giving libraries control over the design of their notices. The platform also allows staff to investigate delivery failures and open rates in more detail.

The Plainfield Area Public Library went live July 1. The other libraries (which are not already using PatronPoint for notices) are working on configuring their notices now.

Acquisitions API

Following the successful launch of Baker & Taylor's configuration with Polaris' Acquisitions API, Pinnacle staff have created a tool which repurposes the API endpoints. With this tool, acquisitions staff can send Purchase Order information directly to the ILS from a spreadsheet like Google Sheets. The API then automatically creates the Purchase Order and any necessary bib/item records.

This tool is intended to be used for large direct orders from vendors who are not configured to provide MARC records or transmit orders through EDI.

PrairieCat

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

Governance
- The final draft FY26 budget and fee schedule was approved by the Delegates Assembly on April 30th.
- Delegates approved revisions to 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 first Delegates Assembly meeting under the new rules will be held on July 30th. Remote sites at the RAILS Coal Valley service center, the Princeton Public Library, the Freeport Public Library, and the New Lenox Public Library will be used initially, with further analysis after the first meeting and feedback from membership.
- A new mobile app contract was approved in April, and we are currently in the process of configuration. We are targeting late August or early September for go-live.

Member Services and UX
- PUG Day 2025 registration is open, and the final program published for this year's in-person event in East Moline, IL.

- 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.
- In May, PrairieCat staff hosted in-person Member Updates at four library locations across the service area and one online Member Update.
- Ecommerce integration in Vega Discover is complete, and ecommerce is disabled in the Encore catalog.
- PrairieCat staff are working with the 71 member libraries that have opted in to the Innovative Mobile App to collect information for the configuration of individual library templates.

IT/Systems

- As a part of ongoing system maintenance, we recently had a successful restoration test from backup of PrairieCat files
- We have finished updating our disaster recovery plan.
- We are now beginning to plan for laptop replacement this year.
- We have re-purposed our old TNS server to allow admin access in case of VPN failure
- Staff helped test the hardware setup for new AC/Delegates meeting procedures
- Staff resolved multiple issues between Sierra and Win11 that were affecting receipt printers.
- We recently updated several receipts for various members.
- Staff completed the annual patron purge, removing 23,843 out of 27,390 inactive patrons owing less than $10. 1,611 out of 14,414 inactive patrons who owed more than $10 were removed.

Library Services

- Over the past quarter, the Library Services team have 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, and the Delegates Assembly.
- We have conducted multiple training sessions, including one-on-one sessions via Zoom.
- Several staff members from our member libraries have successfully completed courses and achieved Item Entry certification.
- Our 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.
- Mills and Petrie Library went "Live" on May 5. One of PrairieCat staff spent 2 days at the library to ensure that everything went well. We had a meeting with the library on June 11, 2025, to assess their progress. Everything is going well at the library.
- We are still testing things out with Mitinet as a potential replacement for MARCive to enhance our database record updates and ensure ongoing standardization. We will continue to update our progress.

Rock River Library Consortium (RRLC)

No report is available at this time.

Resource Sharing Alliance (RSA)

Staff Independence Update

We remain in EIN purgatory; our lawyers are attempting to contact the IRS daily to seek resolution. Should it get to late July without resolution, we'll take around route to get a new EIN so we can move forward, then correct that EIN's filing afterwords. That, at least, would give us a workable EIN, but is a less desirable method.

The EIN situation also means we can't get O365 licenses so we can get step-up and ready for the cutover. We don't think this will be a problem in the end. However, it's annoying not to be able to get our help desk email setup in its final destination now.

We've finalized our IMRF application and mailed that off to them. Now we await the IMRF Board's action to either approved membership or ask for additional information.

RSA and RAILS are awaiting HR Source to finish their assessments of our job descriptions and pay scale. We'll move forward with the hiring process in August and September with or without that being completed to make our 1 January staff start date.

We will be filling at least two currently open positions: Office and Marketing Coordinator, and a Library Systems and Data Analyst. Both have 2 January start date targets.

Other Updates

RSA has moved from RSA managed, free Gmail accounts for libraries. Google's recent changes made it impossible to manage these accounts centrally, and our libraries are starting to see issues with more than one staff member trying to access them too. We've moved the 'official' system email address for our members over to RSA managed IONOS email accounts. These emails are for system generated reports, intra-member emails, and general RSA business. These are not accounts libraries should give to their public. We hope this will keep the traffic loads small and limited only to RSA business.

We have finished visiting each member library and branch to review and update system policies, procedures, fees/fines, due dates, etc. Lesson learned, our members find ways to work around the system when they change policies rather than just calling RSA to update the system. We've tried to make sure each library knows to contact us so we can make their lives easier. This process resulted in nearly 900 individual help desk cases to correct the various issues we found. We have started our regular cataloging or library services site visits with each library getting an in person visit every 18 months.

RSA staff have done a great deal of planning, process generation, and tracking methodology to prepare for issuing individual circulation accounts to all staff in member libraries. We've been testing and revising for the last month and have the process more or less perfected, barring all the edge cases we're running into. In July, we will start a very slow roll-out of the online Circulation module (BLUEcloud Circ) to some text libraries. We wanted to ensure we'd be able to deal with and track the thousands of users moving to this will result in creating. We already have about 1,500 individual cataloger and BLUEcloud Analytics user accounts. We've been using those as are testing pool for all the new procedures.

RSA had 4 school members, 6 total branches, withdraw from RSA as of 1 July 2025. All the schools withdrew due to budgetary reasons.

RSA added 2 new, smaller public libraries to our membership: Hamilton PL and Camp Point PL. We also have a member adding a new branch this year. All were included in this year's RAILS Automation Grants. Thank you, RAILS! Work for these will start in July.

The CMC has finished their work on our cataloging backlog project! They updated 4 braille, 3,318 encoding level 8 records, and 1,358 encoding level M records for a total of 4,680 MARC records. They completed the project about 8 months ahead of schedule.

RSA held another successful RSA Day event in April. We had over 150 staff from member libraries attend and got excellent reviews afterwords. We had a couple issues with the event site, and we'll be moving the event to Macomb for 2026. This also may allow for new staff from area libraries to attend who couldn't or wouldn't make the drive into the Peoria area.

System Wide Automated Network (SWAN)

Aspen Library Software Foundation

SWAN has guided a task force to create a governance model for the Aspen project, which encompasses Aspen Discovery and the Library Discovery App (LiDA). We now have proposed bylaws for the Aspen project, which can be reviewed from the document link below. The legal name of the Aspen project will be the "Aspen Library Software Foundation."

The Aspen Governance Task Force is a group of representatives from the Aspen Community that has been meeting bi-weekly since November 2024. The group has researched what would be needed to either create or join a foundation, as well as different types of open source software governance. Once the Aspen Library Software Foundation governing board is established, it will apply to be part of the Open Library Foundation, which currently serves as a home for eight software projects.

[Aspen Governance Bylaws feedback form](#)

Aspen Series pages: SWAN sponsored enhancement

SWAN financially sponsored with Grove for Libraries to enhance the display and findability of series titles in Aspen Discovery. The Aspen release 25.04 included this feature for libraries worldwide.

SWAN staff are currently using the series enhancements, and we presented these changes to the library membership. The new series pages, previously generated by EBSCO Novelist Select and now generated natively in Aspen, include customization features that will allow SWAN staff to quickly address issues with series display. SWAN ended its subscription to Novelist Select in June.

Online Patron Registration for SWAN libraries

Our project to bring a contemporary online library card sign-up process is nearing completion. SpringShare (now owner of Patron Point) will now fine tune the online patron registration "Verify" product. We presented a rollout plan to libraries at the June Quarterly Meeting. Currently, SWAN libraries are verifying their default profile information for adult and juvenile profiles. We worked with the Circulation Working Group to confirm details of configuration and messaging. Currently we are verifying that our library territory GIS shape files are accurate by running tests on addresses in and outside of service areas. Once this is confirmed, the remainder of our profile configuration will take a number of weeks on SpringShare's end, and we will use that time to draft e-mail verification confirmation messages

and clean up default patron profile data per our libraries' preferences. We expect to go live in August of this year, in time for library card sign-up month in September.

Preventing the acquisition of pirated AV content

SWAN staff Lucas McKeever and Crystal Vela added documentation regarding Pirated A/V content to help library staff identify pirated A/V materials before purchase, after purchase, and how to handle it if already entered into the catalog.

Bibliographic database updates now with Backstage Library Works

We held our kick-off meeting with an account manager at Backstage Library Works, the organization we have partnered with for authority analysis and bibliographic maintenance after the sunsetting of MARCIVE in December 2024. Cynthia Romanowski completed our service profile, which details exactly what maintenance we want performed on bibliographic records and what subject vocabularies we want to track. We will go live with the service in July. The first step involves sending complete extracts of our bibliographic and authority databases to sync our data. The result will be a large upload of bibliographic and authority records. This will require an indexing rebuild on Symphony, which we will perform over Labor Day weekend.

Monthly maintenance operations with their service will work without interruption. Bi-annual updates will mirror the schedule and indexing requirements we experienced with MARCIVE. Library staff and patrons should not notice a change in processing or indexing time.

Explora & Illinois EBSCO research databases

Explora is an alternate interface to EBSCO Discovery Service, which provides curated topics and a more visual design for schools and public libraries. The SWAN E-Resource Working Group completed their review of configuration settings for Explora. Olivia Montolin created default profiles for SWAN libraries to use with Explora.
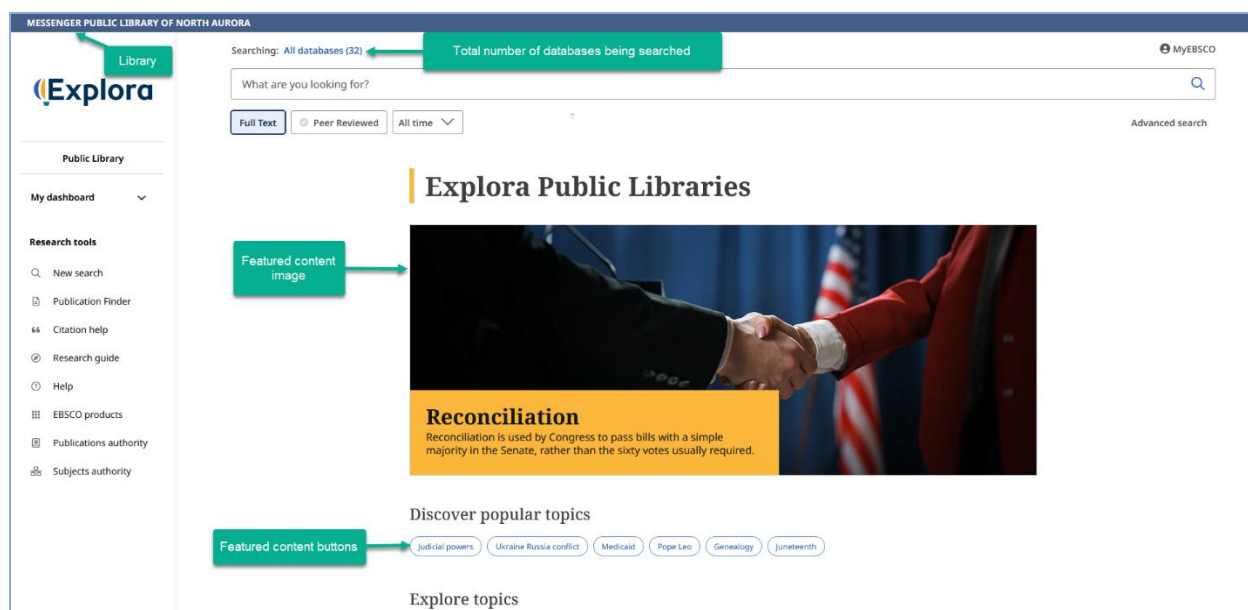
Chicago Tribune pilot with RAILS completed

Four SWAN member libraries were part of the Chicago Tribune pilot program with RAILS. Olivia Montolin worked closely with technical support for the Chicago Tribune to get the libraries set up with OpenAthens for remote authentication. SWAN has 16 libraries that went live on July 1st. The subscription is for digital access to the Chicago Tribune website and the digital daily paper.