

# Consortial Reports

April 20, 2026

## Consortium of Academic and Research Libraries in Illinois (CARLI)

### Administration

- The CARLI Governance Board annual election is taking place.
- CARLI has submitted its FY27 proposed budget to the University of Illinois System Office for review. The budget modeled reduction scenarios for FY27 – FY30 as requested by the University of Illinois System Office.
- CARLI staff with input from its Resource Sharing Committee are developing an Interlibrary Loan Survey to determine current processes, costs and needs of the membership.
- CARLI staff in collaboration with the CARLI Governance Board have developed a member survey to gather direct input from library directors and staff on usage of OCLC products and services, cataloging activities, and budget context.
- CARLI staff are actively reviewing its website and updating as necessary to meet the requirements of [Title II accessibility](#).
- CARLI has implemented Team Dynamics (TDX) as its support ticketing platform.

### I-Share (Alma / Primo VE)

- The Field Museum Library and Chicago History Museum are on-track to be added to I-Share on June 17, 2026.
- CARLI staff are working with CARLI members that subscribe to ebooks available from the Palace Project and OverDrive to make them available via Alma / Primo VE.

### CARLI Committees

- CARLI has issued a [call for volunteers](#) for CARLI committees for terms beginning July 1.
- At its March meeting, the Board approved the formation of an I-Share Metadata Task Force to evaluate, recommend, and develop strategies, policies, and workflows that strengthen metadata quality, interoperability, and cooperation across the consortium.

### 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 Urbana-Champaign. Scholarships may be awarded for both on-campus and/or distance education programs.
- At its March 2026 meeting, the CARLI Governance Board approved the proposal to supplement the CARLI Scholarship in FY 27 and FY 28 with up to \$30,000 from CARLI reserve funds if sponsorships do not meet the monetary needs of the program.

### Collections and EResources

- The Board approved the purchase of ebooks with up to \$300,000 from CARLI reserve funds in August 2026 and August 2027.

- CARLI is reviewing responses to an RFI for our aggregated database package that is provided to all CARLI members at no cost.
- The Board approved the purchase of a subscription for the CARLI Office to [CELUS](#) for a period of 5 years beginning in FY27.

#### Open Educational Resources

- CARLI is reviewing submissions for its [CARLI Member OER Initiative](#).
- CARLI Staff are developing an Illinois Course Materials Survey: Faculty Perspective for faculty at member institutions. The expected launch date for the survey is August 20

### Cooperative Computer Services (CCS)

#### Rolling Meadows and Wauconda Addition

Rolling Meadows and Wauconda staff are finishing up profiling, where they establish their Polaris settings and policies. CCS staff reviewed timeline, tasks, and assignments for building the new libraires in our database. Member Services met to identify training needs and began to develop an internal training plan.

Profiling will wrap up in early April. Innovative will copy and analyze Rolling Meadows and Wauconda data ahead of data mapping. CCS is compiling marketing samples for libraries to use to promote membership expansion. CCS and Innovative will discuss data load strategies with the goal of reducing downtime during the final data load.

#### Bibliocore Implementation

Libraries completed site Validation tasks and CCS continues to work with BiblioCommons to resolve. CCS published a Marketing Toolkit for libraries. Training began with a BiblioCore overview webinar led by BiblioCommons staff. Libraires can begin submitting requests to CCS to configure staff users.

Most libraires have established target launch dates. 21 libraries plan to launch mid-May. 5 libraires will launch between July to October. 4 libraries are still undecided.

CCS and BiblioCommons are scheduling additional training sessions, including training on back-end staff features. CCS is finalizing a patron-facing website that includes basic how-to information and FAQ. CCS is researching information for OPAC and search widget configuration and establishing details for the Patron Preview stage.

#### OrangeBoy Savannah Implementation

CCS has concluded the first round of live training, a recorded webinar, and two office hours sessions. CCS has provided OrangeBoy with a prioritized list of member feedback to address.

#### Find More Illinois

The CCS Governing Board voted to continue with Find More Illinois for three years. CCS will work with libraries not yet implemented to complete configuration and training by the end of the year. RAILS and CCS will meet to discuss benchmarks for future evaluation.

## Innovative and Polaris

### LX Starter

Most Beta Libraries finished configuring SPF and DKIM records on their domains. Beta Libraires attended training in early March to learn how to use LX Starter. The Beta Libraires are designing their notices and submitting to CCS for review. CCS is configuring reminder notices for reciprocal patrons and other notice types to be used with testing.

### Polaris 8.0 Release

Innovative upgraded the CCS database after-hours on Monday, March 23. Member Services led 8.0-focused training, including a What's New webinar, cataloging, and acquisitions training. CCS is working with volunteer libraries to test new features, such as direct-to-printer printing in Leap and TCP/IP service for exporting from OCLC.

### PowerPAC

CCS has been experiencing intermittent performance issues with PowerPAC, seemingly stemming from bot traffic. Staff are continuing to troubleshoot with Innovative support.

### Contract Renewal

CCS and Clarivate/Innovative completed our contract renewal for Polaris for 5 years.

### Member Engagement Analysis

CCS conducted three focus group sessions between March 25–30. Nineteen library staff from 15 CCS member libraries participated, representing Business Office, Circulation, Communications, Public Services, and Technical Services departments. Feedback from these sessions is being used to develop an engagement survey for member staff.

CCS will distribute the engagement survey to member library staff on Wednesday, April 8. As discussed with the Executive Committee in February, the survey will be sent directly to staff with L2 accounts and shared with library directors to distribute to their staff.

### Technology and Infrastructure Changes In Process

CCS transitioned from our physical phone server and analog phone lines for patron notices to a cloud-based service.

CCS staff have recommended moving Web Reports, our locally developed and hosted report repository to the cloud next fiscal year.

## Pinnacle Library Cooperative (PLC)

### Staffing

Pinnacle's Member Services Librarian, Brittany Smith, resigned from her role to accept a new job at the St. Charles Library. We're currently in the process of reevaluating and filling that position.

### Strategic Plan Action Items for 2026

At our annual strategic plan meeting, the board reviewed priorities for 2026. As we approach the end of our current strategic plan, our focus will primarily be on completing remaining projects, including:

- Finalizing the implementation of ILS products such as the Leap Web App, Vega
- Discover catalog and LX Starter for notices.
- Expanding our Learning Management Platform with more interactive content and assessments to check for comprehension
- Rebuilding our in-house collection analysis tool with an emphasis on automation and flexibility
- Begin preparations for next strategic plan (~January 2027)

### PrairieCat

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

#### Member Services and UX:

- PrairieCat staff worked closely with Innovative on upcoming changes to Vega Discover including identifying unexpected issues in Account Portal.
- PrairieCat hosted live training sessions focused on Vega Discover customizations and Mobile App Q&A with more than 30 attendees.
- PrairieCat welcomed 3 new directors this quarter and hosted a new director welcome meeting as well as providing direct outreach and site visits.
- The PrairieCat Engagement Committee is now accepting program proposals for a Virtual PUG (PrairieCat Users Group) Day on September 24 and 25, 2026.
- We are now finalizing our upcoming Resource Sharing Summit on May 5. Each year, we host a session on a specific topic for all levels of staff. This year, our topic will be “Patron behavior policies and best practices”. We will have a representative from Klein, Thorpe, and Jenkins speak on building a policy followed by a panel discussion with several libraries about their policy process. After lunch, we will have a speaker from Rosecrance Behavioral Health who will help library staff learn:
  - Trauma informed practices to better support library users facing barriers such as unhoused patrons or patrons who have mental health challenges
  - Deescalation techniques
  - Best practices for staff to respond to patrons in a timely and direct way that aligns with library policy (including behavior policies and safety and security policies) (While providing good customer service and protecting themselves from burnout)
- We have scheduled two “Ask Anything” virtual open house sessions with the PrairieCat director for May and June.

#### Library Systems:

- Over the past quarter, we 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.

- Multiple courses delivered through our online learning system TalentLMS are undergoing revisions to improve content accuracy and relevance.
- 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.
- After a lengthy evaluation and testing process, PrairieCat has obtained a quote from Mitinet for bibliographic services. This agreement will replace our previous agreement with Marcive. The agreement is subject to approval by the Delegates at the April 29th meeting. Upon approval, all arrangements will be finalized.
- We are working with OCLC to consolidate one of our members' multiple OCLC symbols into the one symbol that is actively used. Currently, the library uses one of their three existing symbols. This will simplify their processes as well as save money by reducing the number of symbols that we pay for.

#### Systems:

- The team rolled out new notice templates to correct issue with overdue templates.
- We worked with a vendor on new checkout receipts.
- We are working with Innovative about certificate renewals with respect to new renewal time limits.
- We finished up distribution of new laptops for employees and conversion of old laptops to training machines.
- Due to email disruptions, we worked on removing PrairieCat from a series of email blacklists. This issue has been resolved.
- We continue to troubleshoot issues with automated calls being blocked.

#### Rock River Library Consortium (RRLC)

Nothing to Report.

#### Resource Sharing Alliance (RSA)

RSA Activity Report January - March 2026

Wired: RSA – Iteration #4

Tired: RSA NFP & RAILS Staffing Support

As shown in many superhero movies, sometimes you just need to reboot everything and retell your origin story. This is essentially what we've done to RSA over the last 18 months. We created a brand new RSA on July 1<sup>st</sup> 2024, then worked to transition from RAILS 'everything' over to RSA owned and operated 'everything' on 1 January 2026 effectively completing the transition to RSA's 4<sup>th</sup> iteration.

- Iteration 1, 1980's – 2000: RSA as a standalone Not for Profit organization with members in 4 library systems

- Iteration 2, 2003 - 2011: RSA operating inside Alliance Library System (ALS) as an ALS department with independent funding
- Iteration 3, 2011-2024: RSA NFP operating as a shell organization, with all staffing and operational support provided through RAILS staff
- Iteration 3.5, 1 July 2024 – 31 December 2025: working towards full independence. This was our chrysalis phase.
- Iteration 4, 1 January 2026: New and Exciting! Fully independent and ready to take on the world.

Turns out, running an existing organization while seeking to minimize disturbances to our member and non-management staff, while simultaneously creating, organizing, setting up, and launching a brand-new organization is a lot of work. Everything we are, touch, use, need, or is required for staff is all new in the last 4 months. Antony and I, with help from Erica and James, have put in the same amount of work to this as we would have done for a full system migration to another vendor. So yea, we're happy to be completed so we can resume doing our actual jobs!

### Upgrades:

With the independence project winding down, it's time to spin up all the things we haven't had time to finish the last 18 months. The first of those was upgrading our Symphony system to the latest version 4.2. That went shockingly smoothly. Now we're playing around with the new options to making item types non-transitable and the shared ownership of reports.

We're also in the midst of upgrading our firewall from an older Cisco model hosted in the Springfield CMS hosting site, to new firewalls. One is hosted on the web as a virtual firewall, the other is a new hardware box in our East Peoria office that we'll be able to use as a backup and emergency alternative path to the system. We've successfully tested both with members and are slowly moving things to the online firewall via DNS redirections. We're doing the SIP ports first since there are fewer users of those and we know exactly who still needs to update their local settings since we can see that in our old firewall. Then we'll move the library Workflows connections over to the new firewall and work with those that need help to update their configurations.

### Member Visits:

We have a policy that we'll visit every RSA member and branch once every 18 months. That means we have to visit about 30 individual buildings every quarter. This does not include training, new directors visits, meetings, and other visit reasons. As of 30 June, we'll have visited all 175 RSA library buildings in the previous 18 months. Then we start again.

- January – 12 in person visits
- February – 27 in person visits
- March – 18 in person visits

RSA's membership of primarily small public and school libraries has a history of showing negative consequences of not receiving in person visits. They are so busy keeping the doors open and lights on, that they can't focus too much on RSA and all that we do. These visits connect our members with our consortia staff and led to much more engagement even months after the visits. It's a lot of work, but we can't overstate the importance of visiting and following up on issues noted during these visits.

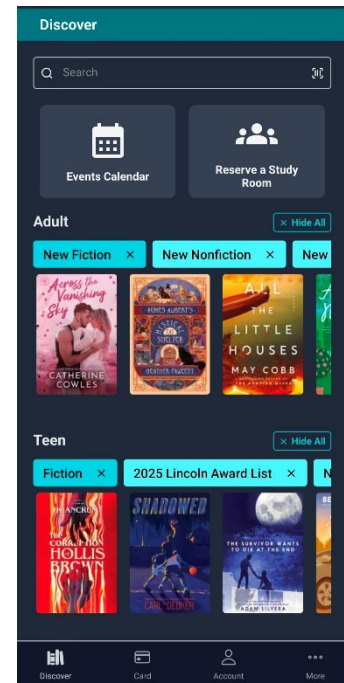
## System Wide Automated Network (SWAN)

### Aspen features of note

Aspen and Library Discovery App (LiDA) have monthly releases which include important features since the January 2026 RAILS Consortia Committee report from SWAN.

### Mobile app (LiDA)

The 26.02 release included the option to add custom home screen links in the app. This was an enhancement requested when SWAN went live on the Aspen LiDA app and is a welcome feature for many of our libraries to highlight their programs, events, and services. Carol Stream Public Library has taken advantage of this feature, for any SWAN libraries that want to check out their instance of the app.



### Palace Project/eRead Illinois integration

Grove for Libraries and Lyrasis have made major strides in improving the Palace Project indexing speeds. We are currently preparing a go-live plan and dates to enable the Palace Project integration into Aspen catalogs.

### Hoopla Flex integration

A new version of the Hoopla API endpoints is now available. This version, V2, was created to support library consortia. V2 has the capability to bring in each Hoopla library's Instant collection and supports individual Flex collections. Grove for Libraries has been working closely with Midwest Tape to test in a staging environment, and they have recently updated our Aspen test environment to support this updated API.

SWAN is currently testing to ensure that Instant titles are coming through the API and that any blocks to titles and changes in price caps are observed. Once we can confirm the Instant titles are working as expected, we will begin testing Flex collections and ensure that individual Flex collections are appearing and working as they currently do on the native Hoopla platform.

### Youth services UI improvements

The 26.03 release included two long-time enhancement requests from our youth services librarians: a new picture book format and the ability to lock filters to save them across different keyword searches.

### Strategic Planning updates

SWAN has completed two strategic planning retreats with SWAN staff and the SWAN governing board. There are three events planned with SWAN membership which will be led by SWAN Board members. The goal is to share our initial five year plan with member libraries the first week of June for feedback.

### SWAN Expo Planning

We have begun planning our August 22, 2026 event. This year, we have formed a Programming Committee to involve a different selection of SWAN staff in the planning process. This group will build out the session schedule, evaluate member program submissions, and align the schedule with a theme.

## **Agenda Item 6.2**

The Administration/Management team will oversee other elements of the event such as communications, registration, pricing, meals, and other logistics of the day. This group visited the event space at NIU Naperville and finalized the meeting rooms we will have at our disposal for the event.