

Consortial Reports

CARLI/I-Share

- Migration to Ex Libris Alma/Primo VE from Ex Libris Voyager is moving along according to schedule for the 91 institutions that are part of CARLI's I-Share resource sharing system. June 24, 2020, is the "go live" date.

CARLI's Ex Libris Alma Primo VE migration project has three major phases as defined by Ex Libris:

- Onboarding January 2019–February 2019
- Vanguard March 2019–June 2019
- Full Test and Implementation July 2019–June 2020

CARLI is getting ready for Phase 3: Full Test and Implementation Phase (July 11, 2019 – June 24, 2020). The Test Phase focuses on building a full test environment for each of the 91 I-Share libraries and a consortial Network Zone. Ex Libris is currently building the test environments and expects to deliver them in early to mid-October 2019. The test environments include all data from each institution's Voyager database plus any e-resource data the library chose to migrate. Test environments will remain in place for the 91 institutions until the final production data loads begin in May 2020. During the approximately 6–7 months that the test environments are in place, I-Share libraries will be able to use the data for staff training as well as for testing and adjusting their configuration settings, workflows, and third-party integrations (e.g., authentication, printing, self-check stations, and more).

CARLI created an Alma Primo VE web page on the CARLI website including an FAQ for the project:

<https://www.carli.illinois.edu/products-services/i-share/alma>

- The CARLI board, staff, and members are excited to celebrate Kristine Hammerstrand's 2019 TBS, Inc., Technical Services Award from the Illinois Library Association, to be presented at the ILA annual conference later this month. Congratulations to Kris on this well-deserved award!
- In July 2019, CARLI welcomed the Chicago History Museum as a new Governing Member.
- Staff changes at CARLI: We welcomed new staff Nicole Ream-Sotomayor, Electronic Resources Senior Coordinator; and Emily Wros, CARLI Graduate Assistant. Additionally, Jenny Taylor was promoted to be the Assistant Director for Electronic Resources following the retirement of Cindy Clennon. Congratulations to all!
- The second in-person session for Cohort One of "CARLI Counts: Analytics and Advocacy for Service Development," was held in Champaign at the I Hotel on July 15–17, 2019. Cohort One participants will display their posters at the CARLI Annual Meeting, scheduled for November 15, 2019. Applications for Cohort Two will be available soon.
- CARLI will host its first-ever "Networking and Career Fair" in partnership with the iSchool at the University of Illinois at Urbana-Champaign on November 14, 2019. See <https://www.carli.illinois.edu/carli-ischool-career-fair> for more details about the event. Please join CARLI and the iSchool; any type of library is welcome to attend! A mixer with students and employers will follow the fair.
- You don't need to be a CARLI member to sign up our Announce email list; it's open to all: <https://carli.illinois.edu/mailman/listinfo/announce>

Cooperative Computer Services (CCS)

- We are currently recruiting for a Member Services Librarian for technical services. The position is open until filled.

- The CCS Governing Board is reviewing recommendations for changes to our governance structure based on the Library Strategies report. We anticipate changes beginning July 1, 2020.
- The Palatine Public Library District board has approved the CCS intergovernmental agreement, and the CCS Governing Board will be voting on membership in November (anticipated).
- In September, CCS staff completed a training session with HR Source called “Taking Control of your Time,” which was well-received. Topics discussed at length were dealing with interruptions and prioritizing multiple projects.
- We are working to formalize the member application process and identify member criteria. Thank you to those who shared their current procedures and documents.

Pinnacle Library Cooperative (PLC)

- In September, the Pinnacle libraries participated in their first “Pinnacle Road Trip”—a joint program to encourage patrons to visit each of the libraries in our consortium. Throughout the month, patrons could pick up a passport at any Pinnacle library. Patrons were then encouraged to visit each of our nine buildings, get the passport stamped, and receive a promotional souvenir. Road trippers who were able to collect stamps from all nine buildings received a special grand prize at the end of the program. For its first year, the program proved incredibly successful. Many patrons (and staff) were very enthusiastic about visiting libraries outside of their “home” branch. It was also an excellent opportunity to highlight the resource sharing and reciprocal borrowing activities that Pinnacle promotes. The Road Trip committee is considering running the program again in the future.
- On August 25, Pinnacle upgraded to the latest version of Polaris—Polaris 6.3. The new version brought some security improvements for patron passwords in the online catalog, integration with JetPay for credit card payments, and some new features for technical services.

PrairieCat

- PrairieCat held its second annual Resource Sharing summit in July. The summit was again facilitated by Amanda Standerfer. This year’s topics of discussion were the PrairieCat Resource Sharing vision and the committee mission. We also performed an “empathy map” exercise to help pinpoint areas for improvement with our training program.
- As one of our FY 2020 initiatives, staff are working on the evaluation and refinement of our training curricula and courses. PrairieCat is attempting to realign training to take advantage of new technologies, as well as evolve our methods to meet current needs of our members. Part of the changes include adding more online training for members using our learning management system (TalentLMS). Membership recently voted to allow individual member libraries to use TalentLMS for their internal staff as well. We will work on configuring test libraries shortly.
- PrairieCat also issued an RFP for a mobile app and is currently analyzing the vendor responses. This initiative will be opt-in, allowing interested members to join at a reduced price based on the number of participants.
- PrairieCat held its sixth annual PUG (PrairieCat Users Group) Day at NIU Rockford on September 20, 2019. Attendance was up again this year at approximately 320, with representatives from roughly 70 libraries. Tentative planning for next year has already begun. The 2020 PUG Day will be held at Tinley Park.

Resource Sharing Alliance NFP (RSA-NFP)

- RSA continues to work with three new libraries that are joining RSA.
 - Flanagan Public Library District is now live in RSA and working on setting up additional services like Hoopla in the system.
 - Ransom Memorial Public Library in Altona is close to finishing cataloging. We will set up a cataloging review/cleanup meeting soon.

- Williamsfield Public Library District is also close to finishing cataloging. We will set up a cataloging review/cleanup meeting soon.
- Astoria Public Library District has been set up by SirsiDynix in our system. After completing the review/cleanup visits with Ransom and Williamsfield, we'll get them started on cataloging. The first step is a phone call to determine what item types, categories, and location codes we'll need to assign to them and then hide the rest of the codes.
- Staffing
Two of three open RSA staff positions have been filled. We added a new Member Services Coordinator and a new Member Services User Experience Coordinator. Our longest-serving Member Services staffer has one year in the position, and they need lots of training. They are working to redo all their department's procedures and visit protocols and are working toward meeting our new, draft strategic plan's outline.

We are having a hard time finding and hiring a qualified Cataloging and Database Coordinator, so that position has been relisted. There aren't many catalogers in central Illinois.

- Office space: Every member of the RSA staff except one has moved offices. We have created a new medium-sized conference room/videoconferencing room. We're now using our office space as efficiently as possible and fully utilizing all rooms and offices in the building.
- Integrated library system news: We broke the new BLUEcloud Mobile app's ability to do e-books due to our size. Even with that, we are in the beta phase and having our libraries download and test the app. We hope to roll it out to patrons in November after updating all the libraries' contact information, fully testing each of our 145 libraries' settings, and hopefully fixing the e-books integration. We'll launch without it if required.

We continue to pilot test the new BLUEcloud Acquisitions product in conjunction with Quincy Public Library. We just started piloting the Data Control system for SirsiDynix, which allows a graphical user interface to the backend API commands and is incredibly powerful for finding, outputting, and editing most system data.

Finally, we did our first MARCIVE test extract, only to find that our settings would not allow our system to input the records back into the system. We've started working with SirsiDynix to make a custom bibload report to help us have a workable, stable method to re-import the entire database twice a year.

- We expect to approve our new strategic plan in November. We've received a lot of feedback from the majority of our libraries, discovered some areas to work on, and were surprised by some of the members' wishes. For example, they want to start working on standards for the consortium. They also would like to restart a mentoring program between libraries and library staff and enforce some member engagement requirements. Good news to system staff for sure. Starting in January, we'll start phase two to design and configure a new multitiered membership structure, then work on a fee structure based on the new membership levels.

Rock River Library Consortium (RRLC)

- No report.

System Wide Automated Network (SWAN)

- Membership Usability Study
SWAN has completed a series of usability studies with member library staff who use the various components of the SWAN Library Services Platform (SirsiDynix WorkFlows, BLUEcloud, EBSCO Discovery, OpenAthens, and OCLC). This research was completed with an eight-member library task force named Clarity, which was composed of member library frontline staff, representing a wide range of expertise.

This task force is collectively charged with assisting the SWAN executive director in evaluating core Library Services Platform software and services and how they are implemented in our consortium.

The membership usability study completed by Clarity used the following research methods:

- Time studies
- Diary studies
- Interviews
- Focus groups

The Clarity Task Force research paper is complete and is available online within the group's October meeting packet. We anticipate Clarity will issue its recommendations and findings to the SWAN board and membership before the end of the year.

- Training Initiatives

SWAN has created a series of training events for member libraries. These are primarily online classes and have been well attended. After an online training event has been completed, the recording of the event is posted online within the SWAN support site.

- Searching in WorkFlows (online training)
- Using WorkFlows and Enterprise Search to Assist Patrons (online training)
- Acquisitions Overview (online training)
- Article Search and EBSCO Discovery Service for Reference Support (online training)
- Resource Sharing Overview for SWAN Libraries (online training)
- OCLC WorldShare ILL: Setting Up Groups & Deflection (online training)
- Serials Control (online training)
- Creating Pre-Cats (online training)
- BLUEcloud Analytics Overview (hands-on training)
- BLUEcloud Analytics Advanced (hands-on training)
- Open Lab: BLUEcloud Analytics (hands-on consultation)
- Open Lab: OCLC Configuration of WorldCat Discovery & ILL (hands-on consultation)

Our goal is to build a catalog of training that can be accessed by any member library staff. We anticipate creating a training curriculum for 2020 based on recommendations from Clarity.