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Consortial Reports

November 9, 2026

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

CARLI Governance Board

The CARLI Annual Meeting is on November 10, 2026, in Champaign. CARLI holds an Annual Directors Meeting on the same date prior to its Annual Meeting.

CARLI Staff

Margaret Chambers, Director and Adviser, Membership and Communications retired on September 30, 2026.
Elizabeth Clarage, Director of Collections Services, will retire on December 31, 2026.

I-Share

CARLI has created an I-Share Metadata Task Force. Its goals are to:

- Assess and enhance metadata practices across member institutions to ensure consistency, transparency, and alignment with shared consortial priorities.
- Recommend improvements to Network Zone workflows, system configuration, and metadata governance.
- Support innovation by evaluating emerging metadata standards and technologies relevant to the consortium.

JKM Library is closed. CARLI is removing JKM Library materials from I-Share.

Continuing Education

CARLI is pleased that Tenn-Share, Tennessee Library Consortium joined the Professional Development Alliance.

E-Resources

CARLI began a subscription to CELUS on July 1, 2026. CELUS is an online platform that helps libraries and consortia harvest, clean, and analyze e-resource usage statistics. CELUS was created by the CzechELib, the Czech national consortium of academic libraries. CELUS stands for CzechELib Usage Statistics. The platform can harvest both COUNTER and non-COUNTER compliant data.

Open Educational Resources

Twelve member libraries were chosen to receive funding for OER projects from the CARLI Member OER Initiative.
CARLI working with its OER Committee will soon announce the 2026 Illinois Open Educator Awards to recognize outstanding higher education faculty and staff who demonstrate innovation and excellence in the use, creation, and advocacy of Open Educational Resources (OER).

Cooperative Computer Services (CCS)

CCS is Hiring!

Cooperative Computer Services (CCS) is seeking an experienced metadata librarian with a passion for collaboration and continuous improvement to join our team of ten. Join our member-driven organization at CCS and play a key role in supporting over 30-member libraries and the communities they serve.

Reporting to the Executive Director, this new full-time position as the Manager of Metadata Services will develop CCS's expanding metadata and technical services offerings to members in addition to providing ongoing support to members related to cataloging, serials, and acquisitions.

See our website for more details.

Rolling Meadows and Wauconda Addition

Rolling Meadows and Wauconda libraries went live with CCS on Tuesday, October 20. CCS and member library staff will continue work on bibliographic deduplication. The new members will have additional reports training in the coming weeks.

Bibliocore Implementation

As of October 1, 28 libraries and CCS are using BiblioCore as their primary discovery layer. 2 libraries are in Public Preview. 2 libraires are in extended preview with launch dates TBD.

In addition, several libraries published new Browse & Discover home pages, including Morton Grove and Cary.

Find More Illinois

The Mount Prospect Public Library launched Find More Illinois on September 28. The Vernon Area and Waukegan libraries are working on initial start up tasks. CCS and RAILS will host training for Vernon Area and Waukegan staff in November. Both libraries will launch Find More Illinois in early December.

Innovative and Polaris

LX Starter

CCS is working with members to implement LX Starter notices, an enhanced notice format. Members have been assigned to 1 of 5 waves, with plans for all members to use LX Started by the end of October 2027. The most time-intensive part of implementation is designing each notice type, which members will do with support from CCS.

System Performance

The geofence was expanded to cover all servers open to the internet, including our training environment. CCS is still waiting for CloudFlare implementation, which should further mitigate bot traffic and related performance issues.

Member Engagement Analysis

The Member Engagement Analysis is complete, and each member has been assigned an engagement score based on activity in FY 2026. Overall, we are pleased to see a high level of engagement across our membership, with 1/3 of members scoring over 90% based on our rubric.

FY 2027 Goals

- Increase the number of library visits per quarter, prioritizing visits to libraries with engagement below average or no high touch services prior year.
- Redesign CCS Bookmark
- Increase Visibility of group decisions. Highlight group meeting notes, recordings, and outcomes in CCS News.
- Identify opportunities for customer service training for CCS staff.
- Consider technical group survey to identify opportunities to increase value and engagement
- Review and update technical group policies and bylaws. Determine whether updates to groups are needed to promote visibility and encourage attendance
- Update CCS logo and branding
- Begin website redesign project
- Develop asynchronous onboarding course that provides an overview of CCS's role and services.

CCS Rebrand and Website Project

CCS is beginning a rebranding and website development project. The effort is beginning this month with a search for a designer to partner on the rebrand and website visuals. The website will be developed in house in calendar year 2027. The request for proposals for brand design is available on the CCS website. Please feel free to share with potentially interested parties.

Pinnacle Library Cooperative (PLC)

PinCon

In August, the Pinnacle libraries came together to host PinCon - a joint staff in-service day bringing employees from all six member libraries together for a day of networking and professional development. Held at the Renaissance Center in Joliet, we had 314 library staff, plus vendors and presenters, for a full day of idea-sharing and networking.

Beyond the professional development and informational sessions, the event also gave staff the opportunity to connect with colleagues throughout the consortium. We're now looking to continue that moment through additional networking and training opportunities for staff.

Vega Discover

For the last several years, we've been development partners for the Vega Discover catalog. Our last requested feature to integrate InterLibrary Loan with OCLC was just released in October. Users can now search for materials and place ILL requests directly in Discover. Once the request is placed, existing integrations with Polaris take over.

We're now working on launching Discover to patrons next Spring, with a potential launch date in March 2027.

Strategic Plan

2026 marks the end of our current strategic plan. With the conclusion of this plan and some other changes on the horizon, this puts us in an interesting position to reflect on the last several

years and look ahead to the next. In January, consultant Amanda Standerfer will help guide a conversation about our priorities and vision for the future. We'll then continue these conversations internally to determine any new strategic directions and action items.

Rock River Library Consortium (RRLC)

Nothing to report.

Resource Sharing Alliance (RSA)

Environmental Scan

The first of these is completing an environment scan of the ILS market. We are currently in the second year of a 2+5-year contract with SirsiDynix. At the end of this year, we could choose to migrate to a new vendor or remain with SirsiDynix. After a conversation with Sirsi representatives we have decided that in all likelihood we will say with them for the rest of the 2+5 but refocus the environmental scan on where vendors are likely to be in 3 years' time with a special focus on the ILS, the public discovery layer, and any reporting module. The information gleaned would be used to help us prepare for a potential migration at the end of 2+5.

The Harmony Project

With that shift in thinking for the Environmental Scan, we approached Sirsi about planning for a migration from our current database to a new clean one which we hoped would enable to clear out 20 years of old gunk in the current database by just leaving it behind. Their advice was to focus on cleaning policies and other data elements out of our existing database instead as a cheaper and less disruptive alternative.

Because we were getting tired of the increasingly inaccurately named "Symphony Cleanup project which may or may not lead to a system migration" I came up with The Harmony Project as a catch all brand for our work to clarify rules and naming conventions, cleanup no longer needed data and standardize among our libraries where possible. Information on progress so far can be found here: https://support.librariesofrsa.org/wp-content/uploads/2026/10/Harmony-presentation-2026-09-30.pdf

In developing the design for the elements of the new database we have followed these fundamental principles.

1. The design language must be system neutral
    - Examples are based on Symphony constraints, but the overall principles should apply in the event we migrate to a different vendor
2. Codes should be human readable
    - Codes should be designed consistently to allow RSA staff and others to easily interpret them
    - When abbreviating codes such as Library System Codes to fit digit constraints vowels are cut first as this leaves the abbreviated code human readable
3. Ensuring a future proof design where possible
    - Codes should be designed to allow for addition of library branches, new circulation rules, new item types, and so on

- RSA has learned through past experience that no design can be future proofed against a library changing its official name

Brief Bot: Bibliographic Data Clean up

As mentioned in my last report we have started working alongside SirsiDynix to build automated procedures to identify brief records in our database which can be merged with each other and then considered for transfer to full OCLC records. With approximately 58,000 brief records currently in WorkFlows (or about 5.5% of the approximately 1,054,000 total bibliographic records), RSA seeks to improve the bibliographic quality of our database to improve discoverability not just in WorkFlows but also for patrons in RSAcat.

The backlog of nearly 58,000 brief records would take the RSA Bibliographic Services Department approximately 30 years to upgrade to OCLC records with full bibliographic description, and that timeline would only be true if no new brief records were created. Because manually upgrading each of these brief records is impossible, RSA is working with SirsiDynix this summer to develop and conduct four phases of brief record cleanup.

Since the last report we have worked with Sirsi to build several stages of this process as automated routines are currently developing the rest. Again, referring to this as "The Automated Brief Record Clean Up Project" was becoming tiresome and so Brief Bot was born. Further details of how Brief Bot will work can be found here: https://support.librariesofrsa.org/wp-content/uploads/2026/09/Brief-Bot-Flyer.pdf. Brief Bot himself was designed by our colleague Maria Ford.

Member Visits

As mentioned in earlier reports, RSA has a policy that we'll visit every RSA member and branch once every 18 months. December will mark the end of the first 18-month period, and we will indeed manage to visit all 167 active branches before the end of this year. In January we will start again with those libraries that received visits from bibliographic service the first time round scheduled to be visited by library services and vice versa.

- July – 10 in person visits
- August – 14 in person visits
- September – 20 in person visits
- October – 16 in person visits

Strategic Plan

RSA has started working on their next Strategic Plan. A survey of all staff at member libraries has started and focus group meetings are scheduled for the first week of November. A member summit will occur in the middle of February. We're looking forward to seeing what clues for RSA's future direction this will provide.

No-Transit Item Types

No-Transit Item Types are now live in ILS with 16 new item types having been created. Fondulac District Library has added nearly 400 items using these new item types into the database. Any no-transit item can be found simply by searching RSAcat for "for checkout and return only" which are required words in the brief record title. No-transit items can be no holds, local holds only, or open to anyone placing a hold on the item. But in all cases, the only library the patron can pick up and return the item to is the item owning branch library.

Additional Staffing

RSA is hiring with interviews in November
Bibliographic Services Specialist (to grow the department by another full cataloger) has been posted.
Library Services Manager (to co-manage the Library Services Department with James) has been posted.
Targeting 11 Jan 2027 as the start date for these two.
Executive Director – interview of Antony will be held at RSA's Board Meeting on November 5th. If successful, he would start after Kendal's retirement in June 2027.

System Wide Automated Network (SWAN)

Official RFP search for ILS & analytics

The SWAN Board approved by unanimous vote at its June meeting to begin a search for an ILS and analytics platform. The timing of the approval allowed the SWAN management team to use the 2026 ALA Conference for meetings with vendors, including the current ILS and analytics provider SirsiDynix. We estimate that the RFP process will take about a full year to complete, which will include software demonstrations and membership involvement. SWAN will not be seeking replacement solutions for Aspen Discover and other third-party solutions such as MessageBee.
SWAN formed the ILS Search Committee with SWAN board has approving the makeup of the group. We had an overwhelming response to our call for volunteers from many talented member staff. The selection process was not easy, and we are grateful to all who put their names forward. Our final committee consists of five member staff and five SWAN staff. The Committee met three times to review the draft RFP document created by SWAN staff.
The RFP document was issued on October 14, 2026. The document, timeline, and aggregated news posts are available on the SWAN webpage below.
https://swanlibraries.net/ils-search/for-vendors
The deadline for responding to the RFP is Friday, November 20, 2026.

Scan & Go pilot: SWAN Libraries + app feature



Scan & Go, the self-check feature in the app, will go live as a public beta for Downers Grove Public Library and Lansing Public Library on November 2, 2026. Any patrons logged in to Downers Grove or Lansing instances of the app will be able to use Scan & Go.

Scan & Go allows patrons to check out items through the SWAN Libraries + app. Instructions for patrons will be available in our catalog help at the start of the beta period.

In addition, the SWAN Libraries + app that is powered by LIDA has undergone significant improvements for its loading speed with the 26.08 release in August. The underlying design system for the app has been updated with the 26.10 release, which improves performance and also lays the groundwork for custom app themes. In addition, this release includes several accessibility fixes. We expect to be able to roll out custom themes for library apps sometime in 2027.

AspenCon 2026

SWAN Bibliographic Services Consultant Lucas McKeever presented at the annual Aspen Discovery conference in Oklahoma City, “Aspen's Adventures in Series-land: Enabling the Series Module.” SWAN was heavily involved with the development of the management feature of series pages in Aspen, and Lucas presented how the feature allowed SWAN to move from a third-party solution provided by EBSCO Novelist Select.

Lucas and SWAN User Experience Manager Tara Wood participated on a panel discussion “The Best Features of Aspen You Aren't Using.”

Manga cleanup

With Aspen having a format filter for Manga, SWAN’s goal is for this popular material type to be much more easily browsed in the public catalog. While reviewing this format, SWAN found that many items within the same series were assigned different formats, some Manga and many Graphic novel. Aspen is coded to assign the format of Manga if the bib record in WorkFlows contains a 655 genre heading that contains the word "Manga." The genre heading "Manga" was only approved as an authorized heading in 2022, with a few other sub genres receiving an authorized status in 2023 and 2024. Due to these headings not being used widely while a majority of our Manga collections were cataloged, we performed a cleanup project to make this format filter work as expected for patrons and staff alike.

Before the project began, the number of bib records with the Manga format assigned in Aspen was 5,522. After the project, the total number is 12,639.

Partial payments

Beginning September 30, 2026, patrons are now able to pay partial payments of fines and bills through the SWAN online catalog and app. For example, if you were billed $20 for a lost item, you could choose to pay $5 installments towards the total bill. Currently, you would have to pay the full $20 bill.

This is a helpful service for patrons to give them more options for paying fines and fees. SWAN turned this feature on by default for all libraries and all payment platforms (PayPal, Stripe, etc.), with the opportunity for a library to opt-out by request.

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Consortial Report: Illinois Heartland Library System SHARE

November 9, 2026

Sharing Heartland's Available Resources Equally (SHARE)

Polaris Upgrade

Polaris was successfully upgraded to version 8.1 at the end of July with minimal downtime.

Transition to Leap

SHARE staff continue to assist member libraries in the transition to Polaris Leap from Polaris Staff Client. Trainings are being held virtually, as well as at member libraries throughout our service area. While no official end date for access to Polaris Staff Client has been set, we are highly encouraging library staff to implement Leap into their daily workflows sooner rather than later.

Tape Recommendations

SHARE staff spent several weeks evaluating tape options for member libraries to develop a recommendation following 3M's discontinuation of removable tape. Tape is used less now in the consortium due to the adoption of three Automatic Material Handling systems across the IHLS hubs, however there are still instances where it is needed. The final recommendation provided by SHARE staff is highlighter tape. This tape is easily removable, does very little, if any damage, fits on standard tape dispensers, and is comparable in price to the original removable tape.

Cataloging Maintenance Center (CMC)

Dr. Pamela Thomas, head of the CMC, will officially retire November 30, 2026. Her replacement, Josh Zink, has been hired and is currently working alongside her to learn the ins and outs of the CMC.



Josh comes to the Cataloging Maintenance Center (CMC) from the Washington University Law Library, with previous experience at SHARE, the Ferguson Public Library, and Greenville University, where he first discovered a love of cataloging. He spends his free time wrangling his children (2) and cats (4), playing his guitar badly, and working through a backlog of video games and books that seems to get longer faster than it gets shorter.