RAILS CONSORTIA COMMITTEE
RAILS CONSORTIA FUTURES SUBCOMMITTEE
JOINT MEETING

Monday, July 20, 2015 |9:30 a.m.

RAILS Burr Ridge Service Center, Videoconference Sites, and Conference Call

125 Tower Drive | Burr Ridge, IL 60527 | 630.734.5000

Conference calling: 800.747.5150; access code 7345000

AGENDA

1. Welcome—Kate Hall (filling in for John Sayers as Consortia Committee Chair)
   a. Videoconference Sites:
      i. RAILS—Bolingbrook
      ii. RAILS—Burr Ridge
      iii. RAILS—Coal Valley
      iv. RAILS—East Peoria
      v. RAILS—Rockford
      vi. RAILS—Wheeling
      vii. Illinois State Library
      viii. IHLS—Edwardsville
      ix. Cherry Valley Public Library District

2. Designation of Minute Taker—Jody Rubel

3. Roll Calls
   a. Consortia Committee members—Jody Rubel
   b. Consortia Futures Subcommittee members—Trisha Novosel

4. Introductions of Guests; Announcements

5. Public Comment

6. Adoption of the Agenda

7. Approval of Minutes
   a. April 20, 2015 Consortia Committee/Consortia Futures Subcommittee joint meeting

8. Open Meetings Act Requirements—Jane Plass

9. Committee and Subcommittee Charges—Kate Hall

10. Overlay Project
    a. Presentation on Phase Two Study: Research into Organizational Factors—Eric Craymer of Growth Management Consulting, Inc.
    b. Vendor Update: Relais International and SirsiDynix Partnership—Jane Plass, Anne Slaughter
    c. Vendor Demos
       i. INN-Reach demo on August 14, 2015 at 9:30 a.m.

ii.   SHAREit demo on August 26, 2015 at 9:30 a.m.
iii.   Relais D2D demo at August 27, 2015 at 9:30 a.m.
d.   Next Steps—Jane Plass

11. Public Comment

12. Reports
   a.   Possible consortial changes and/or collaborations—Consortial representatives
         i.   Illinois RiverShare libraries and PrairieCat
        ii.   LINC, MAGIC, and SWAN
   b.   Meeting with OCLC during ALA annual conference—Jane Plass
   c.   Grants for LLSAP membership—Anne Slaughter
   d.   Printing delivery labels from library management systems—Anne Slaughter
   e.   Individual consortium reports (as time permits)

13. Future Meetings—Jane Plass
   a.   Consortia Futures Subcommittee—July 20, 2015 at 1:00 p.m.
   b.   Overlay Working Group—July 29, 2015 at 2:00 p.m.
   c.   Consortia Committee
         i.   October 19, 2015 at 9:30 a.m.
        ii.   January 18, 2016 at 9:30 a.m.
       iii.   April 25, 2016 at 9:30 a.m. (This is a week later than usual due to a conflict.)

14. Adjournment

Final vote or action may be taken at the meeting on any agenda item subject matter listed above, unless the agenda line item specifically states otherwise.

Consortia Committee Members

- RAILS Board: John Sayers (Chair), Kate Hall
- Consortia Representatives
   o   Cooperative Computer Services (CCS)—Chris Holly, Rebecca Wolf
   o   I-Share—Kristine Hammerstrand
   o   Library Integrated Network Consortium (LINC)—Carol Dawe, Sandra Hill
   o   LINKin—Robert Moffett
   o   Multitype Automation Group in Cooperation (MAGIC)—Yvonne Bergendorf, Kevin Davis (alternate)
   o   Northern Illinois Cooperative (NIC)—Debbie Bloom
   o   Pinnacle Library Cooperative (PLC)—Paul Mills, Jolanta Radzik
   o   PrairieCat—Judy Hutchinson, Susanna Ludwig, Charm Ruhnke (alternate)
   o   Resource Sharing Alliance NFP (RSA-NFP)—Beth Duttlinger, Kendal Orrison
   o   RiverShare—Lee Ann Fisher, Jeffrey Stafford
   o   Rock River Library Consortium (RRLC)—Jennifer Slaney
   o   System Wide Automated Network (SWAN)—Aaron Skog, Rich Wolff
- Leslie Bednar (Illinois Heartland Library System)
- Anne Craig (Illinois State Library)
- Ex Officio: Bill Coffee; Dee Brennan; Jane Plass; Anne Slaughter

Consortia Futures Subcommittee Members

- RAILS Board: Kate Hall, Chair
- Consortia Representatives:
    - Cooperative Computer Services (CCS)—Rebecca Wolf
    - I-Share—Kristine Hammerstrand
    - Library Integrated Network Consortium (LINC)—Pam Leffler
    - LINKin—Laura McGrath
    - Multitype Automation Group in Cooperation (MAGIC)—Yvonne Bergendorf
    - Northern Illinois Cooperative (NIC)—Debbie Bloom
    - Pinnacle Library Cooperative (PLC)—Jennie Mills
    - PrairieCat—Charm Ruhnke
    - Resource Sharing Alliance NFP (RSA-NFP)—Kendal Orrison
    - RiverShare—Lee Ann Fisher
    - Rock River Library Consortium (RRLC)—Amy Lego
    - System Wide Automated Network (SWAN)—Pierre Gregoire
- Illinois Heartland Library System—Leslie Bednar
- Ex officio—Dee Brennan, Jane Plass, Anne Slaughter

Consortia Futures Subcommittee

The Consortia Futures Subcommittee is a subcommittee of the Consortia Committee.

Charge

Develop a shared understanding of the future of consortial resource sharing in RAILS that will provide the best library services to Illinois residents and optimize the use of tax dollars, including:

- Costs and benefits of multiple integrated library system platforms
- Governance models for collaborative projects and merged consortia
- Collaborative approaches to shared needs, such as cataloging, training, and documentation
- Methods of meeting the diverse resource sharing needs of different types of libraries
- Codify relationship between the non-LLSAP consortia and RAILS

Membership

- Appointed annually by the chairperson of the Consortia Committee
- Ex officio members include the Consortia Committee chairperson, the RAILS Executive Director, Associate Executive Director and Director, Technology Services.

Approved by the RAILS Consortia Committee on October 20, 2014

RAILS CONSORTIA COMMITTEE
RAILS CONSORTIA FUTURES SUBCOMMITTEE JOINT MEETING
Monday, April 20, 2015
RAILS Burr Ridge Service Center
125 Tower Drive
Burr Ridge, IL 60527

MINUTES

1. **Welcome—John Sayers, Consortia Committee Chair**
   John Sayers, RAILS Consortia Committee Chair, welcomed everyone and called the meeting to order at 9:30 a.m.

2. **Designation of Minute Taker**
   Jody Rubel, RAILS Administrative Assistant, was designated minute taker.

3. **Roll Calls**
   a. **Consortia Committee members**
   Burr Ridge: Yvonne Bergendorf, Kate Hall, Sandy Hill, Judy Hutchinson, Jennie Mills, Paul Mills, Robert Moffett, Kendal Orrison, Charm Ruhnke, John Sayers, Richard Shurman, Aaron Skog, Rich Wolff
   Coal Valley: Lee Ann Fisher, Jeffrey Stafford
   East Peoria: Beth Duttlinger
   Rockford: Debbie Bloom
   IHLS Edwardsville: Leslie Bednar
   Illinois State Library: Anne Craig
   Phone: Karen Danczak Lyons (joined 9:38 a.m.), Carol Dawe, Susi Ludwig, Jennifer Slaney
   Ex Officio: Dee Brennan, Jane Plass, Anne Slaughter
   Absent: Kevin Davis, Kristine Hammerstrand, Carole Medal, Jolanta Radzik

   b. **Consortia Futures Subcommittee members**
   Burr Ridge: Yvonne Bergendorf, Kate Hall, Pam Leffler, Laura McGrath, Jennie Mills, Kendal Orrison, Charm Ruhnke
   Coal Valley: Lee Ann Fisher
   Rockford: Debbie Bloom
   IHLS Edwardsville: Leslie Bednar
   Phone: Karen Danczak Lyons (joined 9:38 a.m.), Amy Lego
   Ex Officio: Dee Brennan, Jane Plass, Anne Slaughter
   Absent: Pierre Gregoire, Kristine Hammerstrand

4. **Introductions of Guests; Announcements**
   Burr Ridge: Debbie Baaske, Chris Holly, Jim Kregor, Trisha Novosel, Jody Rubel, Wesley Smith, Mary Witt
   East Peoria: Liza Hickey, Erica Laughlin, Martha Troxell
   Illinois State Library: Pat Boze, Greg McCormick
   Phone: Eric Craymer
   Videoconference: Joe Matthews

5. **Public Comments**
   There were no public comments.

6. **Adoption of the Agenda**
   Ms. Plass proposed adding item 10b., Delivery Codes, to the agenda.

   Mr. Shurman moved, and Mr. Orrison seconded, that

   THE COMMITTEES ADOPT THE AGENDA AS AMENDED.

   The motion carried.

7. **Approval of Minutes**
   January 19, 2015 Consortia Committee/Consortia Futures Subcommittee joint meeting
   Ms. Hall moved, and Mr. Moffett seconded, that

   THE COMMITTEES APPROVE THE MINUTES OF THE JANUARY 19, 2015 RAILS CONSORTIA
   COMMITTEE AND CONSORTIA FUTURES SUBCOMMITTEE JOINT MEETING AS PRESENTED.

   The motion carried with one abstention.

8. **OCLC and Alternatives**
   a. **Environmental scan of other consortia**
      Ms. Plass introduced Joe Matthews of JRM Consulting. Mr. Matthews completed an
      environmental scan of OCLC alternatives and presented the final report to the committees. Key
      points of the presentation were background information on OCLC and alternative solutions for
      cataloging and interlibrary services.

      Mr. Matthew's research identified organizations that provided cataloging services using a
      variety of methods. Comparisons included assessments of record quality, number of records
      available, ease of use, and costs.

      The environmental scan included recommendations for reducing the costs for interlibrary loan
      services. Mr. Matthews compared the costs of supplying of interlibrary loans from ten different
      United States consortia and one Canadian consortium.

      Based on the research, Mr. Matthews made five recommendations for RAILS:

      1) Investigate a five-year agreement with SkyRiver.
      2) Create a cataloging center.
      3) A regional catalog (overlay project).
      4) Make the regional catalog discoverable.
      5) In lieu of ILL, encourage libraries to consider the value in purchasing material.
      6) Provide webinars on cataloging alternatives.

      There would a significant costs savings by employing one or more of the recommendations.
      RAILS would also have fiscal and administrative control. The report will be posted to the RAILS

website. After Mr. Matthews' report, committee members had an opportunity to discuss the benefits and implications of reducing reliance on OCLC for services.

b. **Meetings with OCLC**

Ms. Brennan reported that RAILS staff have met with Irene Hoffman (OCLC's Executive Director, Member Relations) and Paul Cappuzzello (OCLC Senior Library Services Consultant) to get a better understanding of OCLC's fee structure, record requirements, etc. Future meetings will be planned, including one with Bruce Crocco (Vice President, Library Services for the Americas). Issues RAILS would like addressed include:

- The mitigation of inequitable fees
- Records use policy and clarification of nonmembers' ability to use OCLC records in shared catalogs
- Sharing of OCLC symbols
- Training by OCLC, as RAILS is not equipped to provide this service
- Fee structure transparency
- OCLC support

RAILS staff have also spoken with staff from the Montana State Library about their experiences with OCLC. Montana had similar concerns with OCLC pricing. Their task force developed a new formula for cost allocation among OCLC members in Montana.

c. **Interim steps**

i. FY2016 OCLC costs in LLSAP grants

Ms. Slaughter stated that RAILS would cover OCLC fees for one year for libraries receiving a RAILS grant to join a LLSAP. In FY2015, libraries were reimbursed $48,000 through grants. Input was invited from ISL and IHLS about RAILS alleviating the burden of OCLC fees for members. IHLS applauds RAILS efforts in aiding libraries in the form of grants. IHLS looks forward to hearing the outcome of RAILS seeking formal relief from OCLC.

ii. Increasing LLSAP cataloging support in FY 2016

Ms. Slaughter reported on the ways RAILS plans to support LLSAPs in FY2016. RAILS plans to increase support for cataloging and original cataloging in FY2016. RAILS is investigating cataloging options with IHLS, which already has catalogers on staff for SHARE and the Cataloging Maintenance Center. One new RAILS position for cataloging will be added in FY2016. Other options include investigating sharing the tasks across the LLSAPs to minimize the duplication of records.

9. **Consortial Changes**
   a. **Patron-centric philosophy**

   Ms. Brennan welcomed Chris Holly as the new executive director of CCS and announced that SWAN has successfully completed their migration to SirsiDynix. In other news, RAILS is actively distributing grant awards for libraries to join LLSAPs. Several libraries have expressed interest in joining LLSAPs. Illinois RiverShare libraries are considering joining PrairieCat, and one library is joining RSA. Any mergers or consolidation decisions should be based on what is best for the patron.

b. CCS

Mr. Shurman introduced Chris Holly. Mr. Holly is beginning as the new executive director at CCS. A brief summary of his experience was shared. He will be transitioning into his new role through June, as Mr. Shurman will retire at the end of June. Mr. Holly expressed his appreciation for the transition plan and looks forward to getting to know the CCS libraries.

c. MAGIC

Ms. Bergendorf stated that MAGIC is in the position to explore strategic options and consider new partnerships with other consortia. She urged other consortia to engage in exploring strategic options because of common goals, patron needs, and to strengthen Illinois libraries. An appeal was made to consortia representatives to hold a discussion with their boards about undertaking the same strategic planning. Mr. Skog announced that SWAN is looking to explore a partnership with MAGIC. During the last year, MAGIC resource-sharing policies have shifted to encourage sharing of materials.

d. RiverShare

Ms. Fisher reported that the eight Illinois libraries in RiverShare are considering rejoining PrairieCat or creating other partnerships; they will probably make an all-or-none decision. The consortium received a proposal from PrairieCat. The consortium is concerned about the impact on the Iowa patrons who use the RiverShare consortium.

10. Best Practices

a. Recommendation on backdating check-ins to date of return

Ms. Slaughter investigated the practice of some predecessor systems regarding backdating an item's date of return when materials are returned at libraries other than the lending library if the date of or return is marked on the label. After a brief discussion, a motion was made regarding the practice.

Ms. Hall moved, and Ms. Mills seconded, that

ALL RAILS LIBRARIES SHOULD HONOR THE DATE OF RETURN MARKED ON THE LABEL WHEN PATRONS RETURN MATERIALS AT LIBRARIES OTHER THAN THE OWNING LIBRARY.

The motion carried.

Subsequent discussion clarified that more generous procedures, such as fine-free check-in, are also acceptable.

b. Delivery routes and L2

Ms. Plass reported that Library Learning (L2) is now the official source for delivery routing information. If consortia are maintaining delivery information in other forms (such as within their databases or as separate lists), that information should be compared against L2 regularly and updated as needed. It would also be helpful for consortia to verify that their member libraries' consortial and ILS information in L2 is correct.

All Chicago Public Library materials should be routed to XBR (RAILS Burr Ridge), and the items will be routed appropriately. RAILS is developing more training on ILL and delivery.

11. Reports

a. Discovery to delivery (overlay) resource-sharing project

Ms. Plass updated the committees on the progress of the overlay project. Rounds 1, 2, and 3 of Phase 2 are now complete. In January, focus groups were completed with ISL, IHLS, and CARLI staff. Round 2 focus groups were held during March with consortia governance and ILL staff. The Round 3 webinars were conducted in April. Great feedback was collected and is currently being assessed. A topline report was emailed to consortia. There were a range of responses. Examples include stronger policies vs. fewer policies and libraries that do not want OCLC to vs. those that do. Libraries are concerned about the impact on delivery. A survey will go out this week to all RAILS members. Eric. Craymer, consultant for this stage of the project, will present his final report in July.

RAILS staff are working on communication efforts for the overlay. Recent efforts include the March member update meeting and the overlay question of the week in RAILS *E-News*. Ms. Plass invited members to submit questions about the project for *E-News*.

Ms. Plass has been completing follow-up conversations with consortia contacted during the Phase 1 environmental scan. Next week at the ICOLC (International Coalition of Library Consortia) meeting, she plans to discuss the overlay project with others that have implemented similar software.

Future steps include inviting vendors to complete demos to learn more about potential overlay software. Demos are not part of the actual software selection, but an education component. The demos would be conducted by webinar or videoconference after July. In late 2015, a call for consortia and standalone libraries interested in participating will be announced. In addition, a software selection working group will be formed. Other working groups will be formed later as needed. We may be able to launch a pilot project in FY2017, but much remains to be done.

b. eRead Illinois rebate for consortia

Ms. Brennan reported that consortia continue to join eRead Illinois. Most recently, CCS took an initial vote. Because of the bylaws, CCS is required to take second vote. Both Pinnacle and LINKin are considering participation.

c. Grants for LLSAP membership

During FY2015, 18 libraries received a total of approximately $298,806.55 in awards for upgrading LLSAP membership or joining a LLSAP. The plan is to continue to offer grants during FY2016; the first round of applications is due in June.

d. Consortia survey final report

Ms. Slaughter recapped the consortia survey final report and invited feedback or questions. The preliminary report was presented in January.

e. **Individual consortium reports**

SWAN: During the many months of work investigating a new integrated library system (ILS), SWAN reached out to more than 50 library staff. The consortium explored all options possible including open-source systems and finally selected SirsiDynix. Once agreed, the implementation started immediately and all milestones were met. Leadership looked at the migration as an opportunity to make decisions based on a more patron-centric focus. A public relations team was formed to educate patrons about the changes by creating a new website, as well as bookmarks for libraries to distribute. An out-of-state library has contacted SWAN to share its experience with marketing. Mr. Skog reported that all issues with the go-live were resolved by April 17. Mr. Wolff recognized and applauded all the communication efforts that SWAN staff pushed out to libraries about issues. Staff appreciated the onsite SirsiDynix support they received.

CCS: One library is interested in joining CCS. Currently CCS is experiencing technical issues with MobileCirc and Windows 8. Staff are developing a roll-out strategy for BLUECloud Analytics. Mr. Shurman congratulated SWAN on its successful ILS migration. Mr. Skog thanked other consortia for their guidance with the migration.

Rock River: No report.

LINC: The consortium has implemented its long-range plan. Members are considering CollectionHQ, eRead Illinois, and eResource Central as well as other partnerships.

RiverShare: The main focus is on the potential migration of libraries joining PrairieCat.

LINKin: No report.

RSA: The Enterprise catalog went live with one glitch: patrons' My Lists did not transfer. eResource Central is now live for patrons. There were some issues with duplicate OverDrive and eRead Illinois records.

RSA staff are looking forward to creating a cataloging department. A new cataloger was hired, and another position will be posted in May. The intent is to work with libraries in providing cataloging support and cleaning up records. Staff are excited about implementing BLUECloud Analytics to help catch and minimize cataloging errors. Libraries and RSA will share the responsibility of cleaning up the records. In the future, only selected libraries with sufficient cataloging proficiency may be able to contribute bibliographic records.

MAGIC: Staff are visiting libraries to work on standardization and training on different SirsiDynix products.

PrairieCat: PrairieCat staff are working to implement eRead Illinois, NoveList, Sierra's Ecommerce, and web-based reporting tools. Another major task is upgrading union list libraries to online libraries.

NIC: No report.

Pinnacle: The Pinnacle Board will vote this week on joining eRead Illinois. The consortium has also decided to join CollectionHQ. Two years remain on the Polaris contract, and Pinnacle is speaking with Innovative representatives about the future. Patrons of the Fountaindale Public Library District in Bolingbrook receive recommendations for future reading materials when they check out.

IHLS: No report.

ISL: No report.

12. Future Meetings

A Doodle poll will be sent out to determine the next Consortia Futures Subcommittee meeting. The July 20 Consortia Committee meeting will be streamed, but not recorded.

13. Adjournment

The joint meeting adjourned at 11:51 a.m.

Illinois Library Technology Consortia

Consortium	Contact Person	Headquarters & Website	Software and Vendor	Member Information
Cooperative Computer Services (CCS)	Chris Holly Administrator cholly@ccs.nsls.lib.il.us 847-342-5300 x204	3355 N. Arlington Heights Rd Suite J Arlington Heights, IL 60004-7706 http://ccslib.org 847-342-5300	Symphony (SirsiDynix)	24 members, all public libraries - Algonquin - Cary - Crystal Lake - Des Plaines - Ela - Evanston - Fox River Valley - Fremont - Glencoe - Glenview - Highland Park - Huntley - Lake Forest - Lake Villa - Lincolnwood - McHenry - Niles - Northbrook - Park Ridge - Prospect Heights - Round Lake - Wilmette - Winnetka-Northfield - Zion-Benton

Consortium	Contact Person	Headquarters & Website	Software and Vendor	Member Information
I-Share	Kristine Hammerstrand Director, User Services khammer@uillinois.edu 217-244-7595	CARLI Office 100 Trade Centre Drive, Suite 303 Champaign, IL 61820-7233 http://www.carli.illinois.edu/products-services/i-share 217-244-7593	Voyager (Ex Libris) Currently in search process for its next ILS platform. Final implementation is anticipated in summer 2017.	85 Illinois libraries belonging to CARLI
Library Integrated Network Consortium (LINC)	Carol Dawe Consortium Manager cjdawe@linc.lib.il.us 630-377-6960	1001 E. Main Street, Suite A St. Charles, IL 60174-2203 http://www.lincnet.info 630-377-6960	Symphony (SirsiDynix)	9 members - Batavia PLD - Bloomingdale PL - Franklin Park PLD - Geneva PLD - Glen Ellyn PL - Itasca Community Library - St. Charles PLD - Villa Park PL - West Chicago PLD
LINKin	Robert Moffett Manager of Technical Services Gail Borden Public Library District 270 N. Grove Avenue Elgin, IL 60120 http://www.gailborden.info rmoffett@gailborden.info 847-742-2411	No separate headquarters or website	INN-Reach to connect separate Millennium and Sierra systems (Innovative Interfaces)	9 members - Arlington Heights Memorial Library - Cook Memorial Public Library - Deerfield Public Library - Elmhurst Public Library - Gail Borden Public Library - Naperville Public Library - Skokie Public Library - Waukegan Public Library - Wheaton Public Library
MAGIC	Anne Slaughter RAILS Director of Technology Services/Interim MAGIC Director anne.slaughter@railslibraries.info 630-734-5127	RAILS Burr Ridge 125 Tower Dr. Burr Ridge, IL 60527 http://www.railslibraries.info/catalogs/magic 630-232-8457	Symphony (SirsiDynix)	RAILS LLSAP Full members: 14 agencies; 19 buildings (as of July 2014)

Consortium	Contact Person	Headquarters & Website	Software and Vendor	Member Information
Northern Illinois Cooperative (NIC)	Mary Petro Library Director North Suburban Public Library District marype@northsld.org	North Suburban Library District serves as NIC's headquarters. 6340 North Second Street Loves Park, IL 61111 http://www.niclibraries.org 815-633-4247	Millennium (Innovative Interfaces) The consortium is currently evaluating ILS software packages to determine the best fit for current needs as well as anticipated future patrons services. Cost is a factor as is ease of use, standard features versus add-ons, and ability to adapt for consortia.	8 members • Cherry Valley PLD • Harvard Diggins Library • Howard Colman Library (Rockford College) • Ida PL (Belvidere) • Nippersink PLD (Richmond) • North Suburban Library Dist. (Loves Park, Machesney Park, Roscoe) • Talcott Free PLD (Rockton) • Woodstock PL
Pinnacle Library Cooperative (PLC)	Jennie Cisna-Mills Director Shorewood-Troy Public Library District 650 Deerwood Drive Shorewood, IL 60404-8666 Jennie.cisna@gmail.com 815-725-1715 Jolanta Radzik System Administrator Shorewood-Troy Public Library District jradzik@shorewoodtroylibrary.org	Joliet Public Library 150 North Ottawa Street Joliet, IL 60432 http://pinnaclelibraries.org/	Polaris (Polaris)	6 members • Fountaindale PLD • Joliet PL • Lemont PLD • Plainfield PLD • Shorewood-Troy PLD • White Oak Library District

Consortium	Contact Person	Headquarters & Website	Software and Vendor	Member Information
PrairieCat	Judy Hutchinson PrairieCat LLSAP Services Manager judy.hutchinson@railslibraries.info 309-623-4314	RAILS Coal Valley 220 W. 23rd Avenue Coal Valley, IL 61240 http://www.railslibraries.info/catalogs/prairiecat 877-542-7257	Sierra (Innovative Interfaces)	RAILS LLSAP Full members: 69 agencies/93 buildings (as of July 2014) Basic online members: 5 agencies/5 buildings (as of July 2014) Union listing members: 60 agencies/81 buildings (as of July 2014)
Resource Sharing Alliance NFP (RSA-NFP)	Kendal Orrison RSA LLSAP Services Manager kendal.orrison@railslibraries.info 309-740-2452	RAILS East Peoria 600 High Point Lane East Peoria, IL 61611 http://www.railslibraries.info/catalogs/rsa 309-694-9200	Symphony (SirsiDynix)	RAILS LLSAP Full members: 74 agencies/109 buildings (as of July 2014) Basic online members: 53 agencies/60 buildings (as of July 2014) Union listing members: 16 agencies/16 buildings (as of July 2014)
RiverShare	Any Groskopf RiverShare Executive Committee Chair and Assistant Director Davenport Public Library 321 Main Street, Davenport, IA 52801 agroskopf@davenportlibrary.com	Davenport Public Library, 321 Main Street, Davenport, IA 52801 http://www.rivershare.org	Polaris (Polaris)	8 Illinois members • East Moline PL • Henry C. Adams/Prophetstown • Moline PL • River Valley Dist. Lib/Port Byron • Robert R. Jones/Coal Valley • Rock Island PL • Sherrard PLD • Silvis PL 12 Iowa Libraries

Consortium	Contact Person	Headquarters & Website	Software and Vendor	Member Information
Rock River Library Consortium (RRLC)	Jennifer Slaney Library Director Sterling Public Library 102 West Third Street Sterling, IL 61081-3505 librybear@aol.com 815-625-1370	Sterling Public Library, 102 W. 3rd Street, Sterling, IL 61081 Consortial catalog is searchable through Sterling's website at http://www1.youseemore.com/sterling/	Library Solution (TLC)	7 members: • Dixon High School • Dixon PL • Newman Central Catholic High School • Rock Falls High School • Rock Falls PL • St. Andrews Grade School (Rock Falls) • St. Mary's School (Sterling) • Sterling PL • Sterling Public Schools
SHARE	Chris Dawdy SHARE Director Illinois Heartland Library System 6725 Goshen Road Edwardsville, IL 62025 cdawdy@illinoisheartland.org 618-656-3216 x443	Illinois Heartland Library System SHARE staff is located at the IHLS offices in Du Quoin, Champaign, and Edwardsville http://share.illinoisheartland.org	Polaris (Polaris)	Illinois Heartland Library System LLSAP 295 library agencies; 427 library buildings
SWAN	Aaron Skog SWAN Executive Director aaron.skog@railslibraries.info 630-734-5122	RAILS Burr Ridge 125 Tower Drive Burr Ridge, IL 60527 http://www.railslibraries.info/catalogs/swan 630-734-5000	Symphony (SirsiDynix)	RAILS LLSAP Full members: 77 agencies/79 buildings (as of July 2014)

RAILS Consortia Committee

Charge and Guidelines

The name of the group will be the RAILS Consortia Committee. It replaces and expands on the RAILS LLSAP Task Force.

It will be comprised of two members of the RAILS board, one representative from the Illinois State Library, and two representatives from each consortium within RAILS that chooses to participate. Consortia invited to participate include:

- Cooperative Computer Services (CCS)
- I-Share
- Library Integrated Network Consortium (LINC)
- LINKin
- Multitype Automation Group in Cooperation (MAGIC)
- Northern Illinois Cooperative (NIC)
- Pinnacle Library Cooperative (PLC)
- PrairieCat
- Resource Sharing Alliance NFP (RSA-NFP)
- RiverShare
- Rock River Library Consortium (RRLC)
- System Wide Automated Network (SWAN)

Ex officio members include the RAILS Board President, the Executive Director, Associate Executive Director and Director, Technology Services.

Members of the committee will be expected to:

- Attend group meetings in person or electronically
- Study consortia sharing integrated library systems and/or interlibrary loan systems, both in Illinois and other states
- Present findings and recommendations to the RAILS board and to the boards of participating consortia

The committee is charged with investigating ways to improve and increase resource sharing among member libraries in RAILS and making appropriate recommendations to the RAILS Board and the Illinois State Library to accomplish improvements. This includes:

- Serving as a means of communication among RAILS and its consortia

- Establishing a shared understanding of the benefits of resource sharing for Illinois libraries and residents
- Developing a core set of philosophies and practices that will facilitate resource sharing
- Identifying current barriers to resource sharing and developing a plan to overcome them
- Investigating best practices in resource sharing in other states
- Making recommendations on how RAILS can support consortia to ensure continuity of services, enhance services to consortial members, make membership more affordable, promote the advantages of consortial membership, and foster cost-effective resource sharing among Illinois libraries
- Overseeing a working group that will:
  - Investigate discovery and fulfillment overlay products that will work across different ILS platforms
  - Oversee the development of an RFP for a discovery and fulfillment overlay product in conjunction with RAILS FY2014 plan of service
  - Make a recommendation on a discovery and fulfillment overlay product that could serve both consortia and standalone libraries
- Working with the Illinois State Library (ISL) and Illinois Heartland Library System (IHLS) to ensure statewide understanding of needed changes
- Working with the Future of Resource Sharing Committee (FORSC) and the Illinois State Library Advisory Committee (ISLAC) on improvements and changes, including developing a plan for expanding state support for resource sharing beyond LLSAPS to all consortia and standalone libraries that participate in resource sharing

RAILS Overlay Project Stage 2

Presented by Eric Craymer
Growth Management Consulting

1

Journey back into the past
…and into the future!

Special Thanks to…

- RAILS Staff (especially Jane and Jody!)

- Overlay Project Working Group

- Randy Dykhuis and Debbi Schaubman from Midwest Collaborative for Library Services, technical consultants

3

History

- Stage 1: Environmental Scan
    - Identified likely software products

- Stage 2: Organizational Factors
    - Aspirations
    - Perceived barriers
    - Functionalities
    - Political issues (governance, shared policies, cost sharing)
    - And more!

4

Goals

- Gather information for insight

- Identify values and preferences

- Stimulate thinking about an overlay

- Hear all voices

- Synthesize

Process

- Background documentation
- Overlay Project Working Group
- Consortia Committee, Consortia Futures Subcommittee
- State Stakeholders (ISL, CARLI, IHLS)
- 11 Consortium visits with Leadership (decision makers) and ILL staff (who have to work with it)
- 6 web based focus groups
- Survey

6

What topics

- Hoped for benefits
- Functionalities
- Likely participation
- Perceived value of the overlay
- Current state of ILL process (like, don't)
- Governance
- Cost sharing
- Deal breakers
- Shared policies

7

Diversity AND Collaboration!

8

Range of acceptability

9

R--a—n—-g——-e-------s

- All requests must be mediated --- No request should be mediated

- We don't want to lose OCLC --- We can't wait to reduce our reliance on OCLC

- Consortium needs lots of hands in governance --- Less consortium work allows fewer hands and lower overhead

- We will pay our fair share --- We will need financial support to participate

10

Focus Group Findings… State Stakeholders

- Illinois State library, IHLS and CARLI support trying it!

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Focus Group Findings… Functionality

- Foremost – achieve exceptional improvement in patron experience

- Achieve more effective and efficient ILL processes for library staff

- Provide better information to help with library operations and decisions

- High reliability, resilience and seamless integration with existing ILS

- Has to achieve significant improvement on top of what consortium members have now

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Focus Group Findings – Governance (admin/cost)

- Decision body with clear charge and accountability

- Small enough that it can make decisions

- Shared policies are going to need a lengthy process of sharing and compromising

- Costs must be affordable, equitable, transparent and scaled

Focus Group Findings – Political buy-in

- Needs to show a clear improvement on or over OCLC

- Need to trust that it is sustainable (for multiple years)

- Need assurance that it won't blow up!

- Want to see something just like Illinois where it has worked, we are a unique environment

- Some have no interest in being a part

Focus Group Findings -- Unexpected

- The success of any software will require that all elements of the ILL process function smoothly, especially in light of volume increases.
  - Delivery – prepared to handle the volume
  - Training – initial, ongoing and refresher
  - Support for small libraries – IT, uploads, etc.

- "…increased volume benefits patrons until it overwhelms service capability"

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The Survey

- 154 responses.
- Test what we think we heard…
  - 16 library factors, 8 patron factors, 2 participation likelihood, 1 overlay value

But…

Not statistically sampled
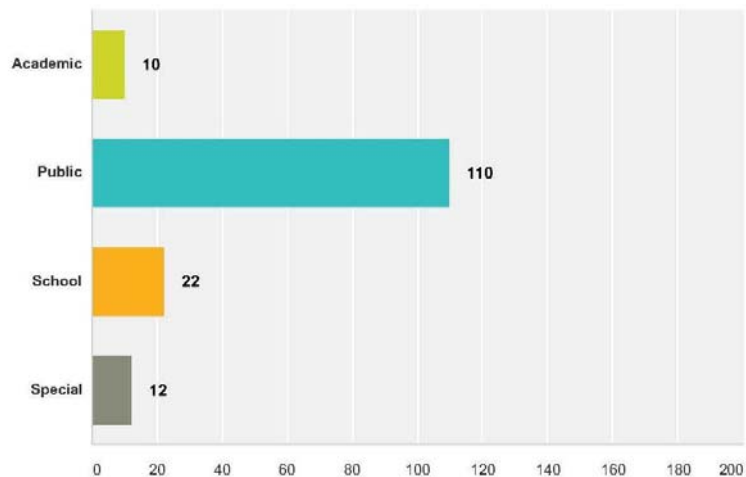
And…

16

Respondents by Type

Q1 Type of library (Please check one)

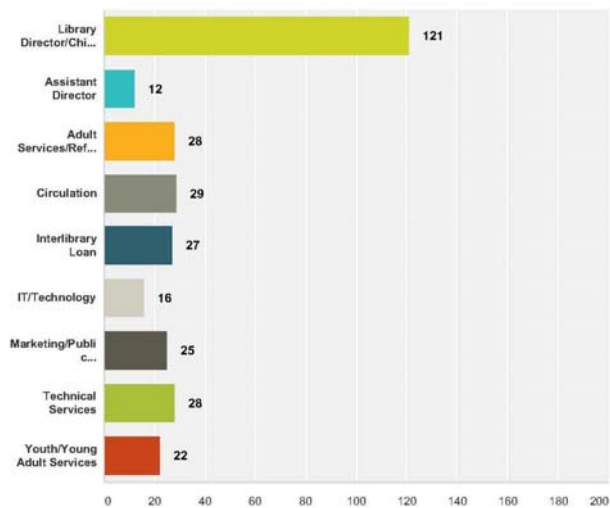Answered: 154   Skipped: 0

17

Respondents by Responsibility

Q4 What is your primary responsibility at your library? (Please check all that apply.)

Answered: 154   Skipped: 0

18

Focus and limit

- Selected only the most critical criteria to prevent death by survey
    - Function for library
    - Function for patron
    - Likely participation
    - Perceived value
    - Funding/Governance
    - Deal breakers

- **Just because you've got data you don't have to crunch it! (must provide meaningful insight)**
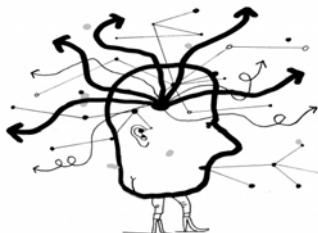
Non-Scientific Highlighting

- The ranges of 1-10 or 1-11 generally made it hard to differentiate

- Chose to highlight by assigning value ranges: low = 1-3, mid = 4-7, high = 8-10

    (11 was "don't know")

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OVERALL Results: Library Factors

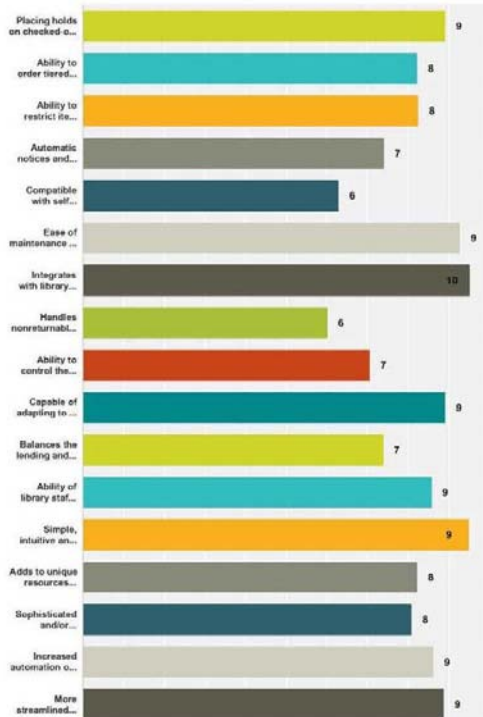|	Low 1-3		Mid 4-7		High 8-10		Don't Knows (11)
Placing holds on checked-out materials.	7.25%		6.52%		81.88%		4.36%
Ability to order tiered searching priority (for example, local first then region).	9.35%		15.83%		66.91%		7.91%
Ability to restrict items from lending, (such as new items and special collections).	8.63%		15.11%		74.10%		2.16%
Automatic notices and alerts to library staff (such as "request to be reviewed," "item shipped," etc.)	11.68%		29.93%		53.28%		5.11%
Compatible with self checkout.	34.53%		15.83%		35.25%		14.39%
Ease of maintenance and amount of work required to it run at the local library staff level	1.44%		8.63%		86.33%		3.6%
Integrates with library's current integrated library system to avoid adding another set of processes.	2.17%		2.17%		88.41%		7.25%
Handles nonreturnables (such as photocopies).	33.58%		26.28%		22.63%		17.52%
Ability to control the number of search results displayed (such as "1" or "all").	10.95%		43.07%		37.96%		8.03%
Capable of adapting to new standards and formats.	2.92%		11.68%		0.00%		8.76%
Balances the lending and borrowing within individual libraries.	12.23%		28.78%		48.92%		10.07%
Ability of library staff to authenticate a reciprocal borrower's status online.	4.38%		13.87%		72.99%		8.76%
Simple, intuitive and understandable for library staff.	0.72%		4.35%		89.13%		5.8%
Adds to unique resources available.	3.62%		26.09%		64.75%		11.59%
Sophisticated and/or customizable reporting capabilities.	4.32%		25.18%		64.75%		5.76%
Increased automation of interlibrary loan workflow.	3.65%		15.33%		70.80%		10.22%
More streamlined work process for the staff involved.	2.9%		12.32%		80.43%		4.35%

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OVERALL Results: Library Factors

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OVERALL Results: Patron Factors Q10

|	Low 1-3		Mid 4-7		High 8-10		Don't Knows (11)
Ability to work on multiple devices (such as mobile phone as well as computer).	4.34%		18.11%		73.91%		3.62%
Automatic notices and alerts to patron (such as "due soon," "book received and waiting," etc.)	5.06%		13.04%		77.54%		4.35%
Sophisticated search and discovery.	2.92%		16.06%		75.19%		5.84%
Handles e- resources (such as e-books).	12.32%		15.95%		67.39%		4.35%
Shows status in patron account (such as holds, checked out, etc.)	2.19%		10.95%		83.21%		3.65%
Single sign-in patron authentication.	3.69%		14.72%		74.27%		7.35%
Patron capability to specify pickup location.	11.60%		13.77%		68.12%		6.52%
Simple, intuitive and understandable for patrons.	2.19%		0.00%		92.7%		5.11%

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OVERALL Results: Patron Factors Q10

Q10 How important are each of the following possible functions for a successful overlay software? (Please rate each factor on a 1-10 scale, with 1 being not at all important and 10 being extremely important.)

Answered: 138   Skipped: 16


24

12
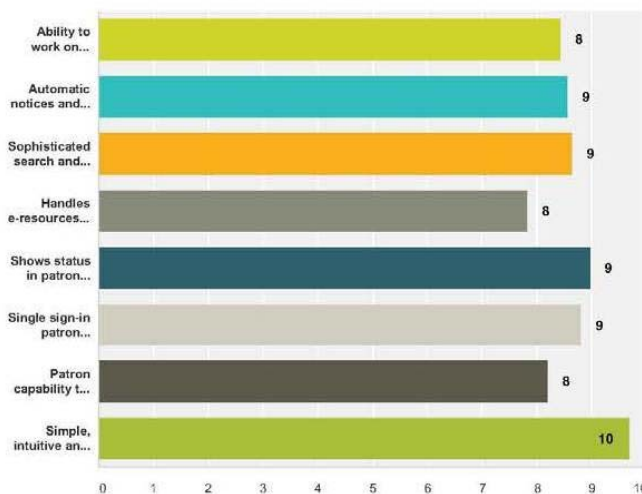
OVERALL Results: Likelihood Participate

	1 (1)	2 (2) LOW	3 (3)	4 (4)	5 (5) MID	6 (6)	7 (7)	8 (8)	9 (9) HIGH	10 (10)	Total	Weighted Average
You would want your library to participate?	5.88% 8	2.94% 4	1.47% 2	3.68% 5	8.82% 12	8.09% 11	7.35% 10	13.97% 19	13.97% 19	33.82% 46	136	7.51
		10.29%			27.94%				61.76%			
Your governing entity would want your library to participate?	8.89% 12	2.96% 4	5.19% 7	4.44% 6	9.63% 13	9.63% 13	6.67% 9	13.33% 18	14.07% 19	25.19% 34	135	6.86
		17.04%			30.37%				52.59%			

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OVERALL Results: Likelihood Participate

Q12 **If the overlay software and its associated services (delivery, training, support, etc.) could deliver the functions, characteristics and benefits you valued above at an affordable cost, how likely is it that:(Please rate this on a 1-10 scale, with 1 being not at all likely and 10 being extremely likely)**

Answered: 137   Skipped: 17

26
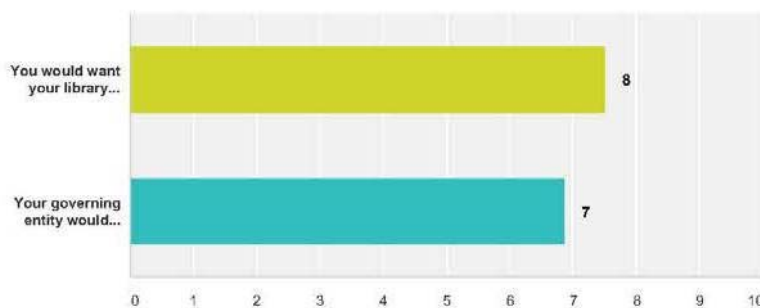
OVERALL Results: Perceived value of overlay

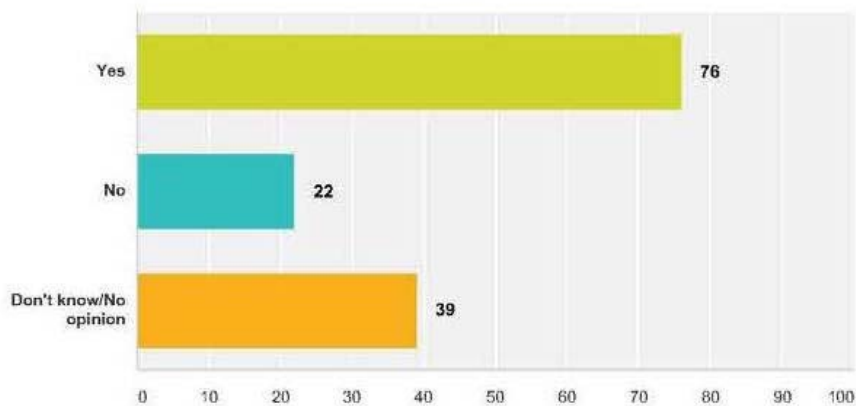| Answer Choices	Responses	
Yes (1)	**55.47%**	76
No (2)	**16.06%**	22
Don't know/No opinion (3)	**28.47%**	39
Total		137

27

OVERALL Results:
Perceived value of overlay

Q13 Do you feel that an overlay, whether or not you chose to participate, would be an important place for RAILS to invest?

Answered: 137   Skipped: 17


28

OVERALL Results: Governance and cost sharing

Answer Choices	Responses	
Staff time. (1)	**65.38%**	85
Participation in its governance. (2)	**39.23%**	51
A flat annual fee for participation scaled to library size. (3)	**57.69%**	75
A scaled annual fee based on a rational and understandable formula. (4)	**48.46%**	63
Share of the annual software licensing/maintenance costs. (5)	**28.46%**	37
Share of the initial software cost. (6)	**24.62%**	32
Total Respondents: 130		

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OVERALL Results: Governance and cost sharing

Q14 If your library did participate in an overlay, which of the following contributions to its success would seem reasonable? (Check all that you would consider)

Answered: 130   Skipped: 24

Staff time.	85
Participation in its...	51
A flat annual fee for...	75
A scaled annual fee...	63
Share of the annual softw...	37
Share of the initial...	32
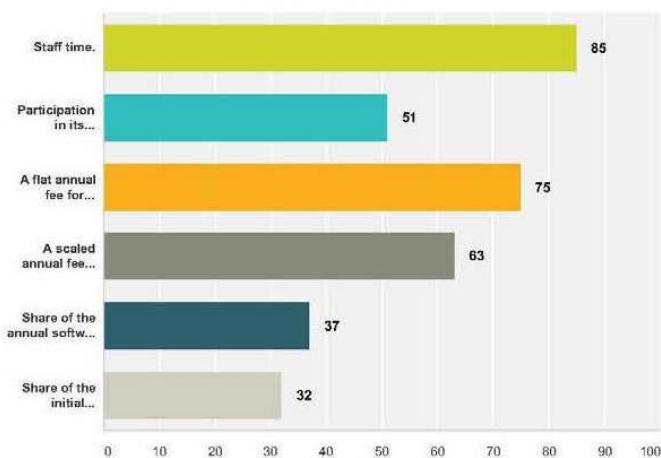
30

OVERALL Results: ILL process

Answer Choices	Responses	
Yes (1)	**55.47%**	76
No (2)	**16.06%**	22
Don't know/No opinion (3)	**28.47%**	39
Total		137

1

OVERALL Results: ILL process

Q15 Which of the following elements of your existing library-to-library ILL process would you find valuable to improve? (Check all that you would consider)

Answered: 115   Skipped: 39

Multiple steps needed to... 81
Lack of information... 47
Delivery time. 49
Uniformity of barcoding. 38

32
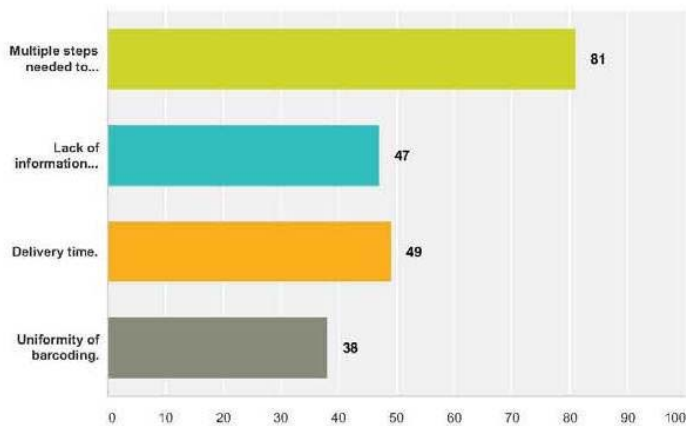
OVERALL Results: Deal Breakers

Answer Choices	Responses	
Staffing increases. (1)	**46.67%**	63
Cost increases. (2)	**79.26%**	107
More space required in the library. (3)	**41.48%**	56
The process is one more added on top of those we already have. (4)	**55.56%**	75
The experience is not seamless for the patron. (5)	**61.48%**	83
Total Respondents: 135		

33

OVERALL Results:
Deal breakers

Q16 Which of the following, if they occurred, would cause you to not participate in an overlay? (Check all that you would consider)

Answered: 135   Skipped: 19

Staffing increases.	63
Cost increases.	107
More space required in ...	56
The process is one more add...	75
The experience is not seaml...	83
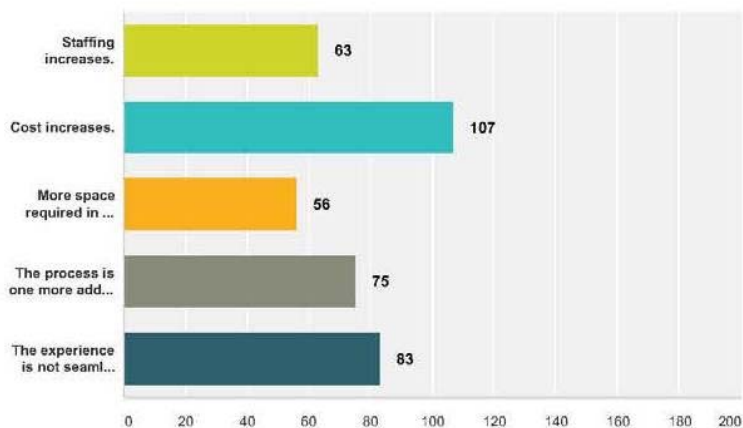
34

RESULTS by Group

- Looked at:
  - Region
  - Size
  - Type
  - Shared automation situation

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RESULTS by Group

- Region – too few responses for comparison
- Size – limited value but interesting anomaly
- Type – **very interesting!**
- Shared automation situation – **very interesting!**

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Likelihood by Type

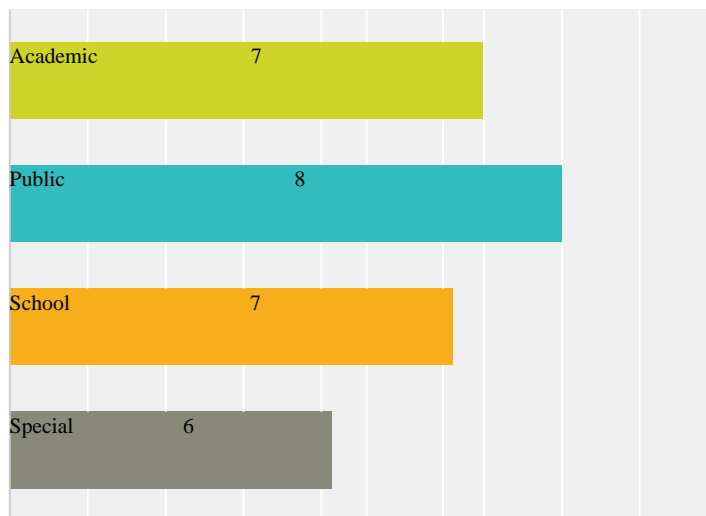| You would want your library to participate?	1 (1)	2 (2) LOW	3 (3)	4 (4)	5 (5) MID	6 (6)	7 (7)	8 (8)	9 (9) HIGH	10 (10)
Q1: Academic (A)	0.00%	0.00%	0.00%	14.29%	0.00%	28.57%	14.29%	28.57%	0.00%	14.29%
		0.00%			57.15%				42.86%	
	0	0	0	1	0	2	1	2	0	1
Q1: Public (B)	3.03%	3.03%	2.02%	1.01%	6.06%	6.06%	7.07%	15.15%	16.16%	40.40%
		8.08%			20.20%				71.71%	
	3	3	2	1	6	6	7	15	16	40
Q1: School (C)	11.11%	0.00%	0.00%	5.56%	22.22%	11.11%	11.11%	0.00%	16.67%	22.22%
		11.11%			50.00%				38.89%	
	2	0	0	1	4	2	2	0	3	4
Q1: Special (D)	25.00%	8.33%	0.00%	16.67%	16.67%	8.33%	0.00%	16.67%	0.00%	8.33%
		33.33%			41.67%				25.00%	
	3	1	0	2	2	1	0	2	0	1

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Likelihood by Type

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Likelihood by Shared System

You would want your library to participate?										
	1 (1)	2 (2) LOW	3 (3)	4 (4)	5 (5) MID	6 (6)	7 (7)	8 (8)	9 (9) HIGH	10 (10)
Q7: RAILS LLSAP (MAGIC, PrairieCat, RSA, or SWAN) (A)	1.52%	0.00%	0.00%	1.52%	4.55%	4.55%	6.06%	15.15%	18.18%	48.48%
		1.52%			16.68%				81.81%	
	1	0	0	1	3	3	4	10	12	32
Q7: Independent automation consortium comprised of different agencies (for example, CCS, I-Share,LINC, NIC, Pinnacle, RiverShare, Rock River Library Consortium) (B)	11.76%	5.88%	11.76%	5.88%	11.76%	5.88%	11.76%	17.65%	0.00%	17.65%
		29.40%			35.28%				35.30%	
	2	1	2	1	2	1	2	3	0	3
Q7: Online catalog shared by multiple school libraries within a single district (C)	30.00%	0.00%	0.00%	10.00%	10.00%	10.00%	0.00%	0.00%	20.00%	20.00%
		30.00%			30.00%				40.00%	
	3	0	0	1	1	1	0	0	2	2
Q7: Online catalog not shared with other libraries (standalone) (D)	2.94%	8.82%	0.00%	5.88%	14.71%	14.71%	8.82%	14.71%	14.71%	14.71%
		11.76%			35.30%				44.13%	
		A								A
Q7: No online catalog (E)	11.11%	0.00%	0.00%	0.00%	11.11%	11.11%	11.11%	11.11%	0.00%	44.44%
		11.11%			33.33%				55.55%	
	1	0	0	0	1	1	1	1	0	4

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Likelihood by Shared System

Answered: 136   Skipped: 0

You would want your library to participate?

- Q7: RAILS LLSAP (MAGIC... — 9
- Q7: Independent... — 6
- Q7: Online catalog shar... — 6
- Q7: Online catalog not... — 7
- Q7: No online catalog — 7
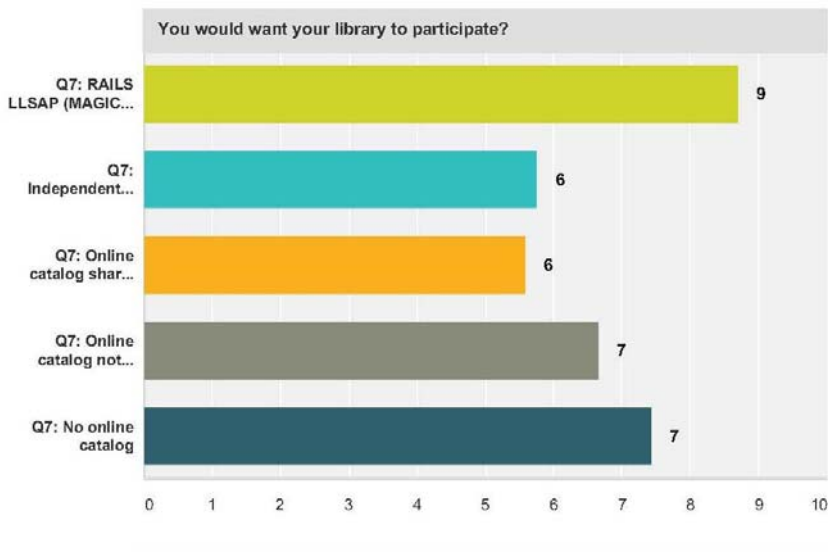
40

Value by Type

	Yes (1)	No (2)	Don't know/No opinion (3)	Total
Q1: Academic (A)	**50.00%** 4	**0.00%** 0	**50.00%** 4	**5.84%** 8
Q1: Public (B)	**61.62%** 61	**19.19%** 19	**19.19%** 19	**72.26%** 99
Q1: School (C)	**50.00%** 9	**5.56%** 1	**44.44%** 8	**13.14%** 18
Q1: Special (D)	**16.67%** 2	**16.67%** 2	**66.67%** 8	**8.76%** 12
Total Respondents	76	22	39	137

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Value by Shared System

	Yes (1)	No (2)	Don't know/No opinion (3)	Total
Q7: RAILS LLSAP (MAGIC, PrairieCat, RSA, or SWAN) (A)	**65.15%** 43 D	**7.58%** 5	**27.27%** 18	**48.18%** 66
Q7: Independent automation consortium comprised of different agencies (for example, CCS, I- Share,LINC, NIC, Pinnacle, RiverShare, Rock River Library Consortium) (B)	**33.33%** 6	**61.11%** 11	**5.56%** 1	**13.14%** 18
Q7: Online catalog shared by multiple school libraries within a single district (C)	**70.00%** 7	**0.00%** 0	**30.00%** 3	**7.30%** 10
Q7: Online catalog not shared with other libraries (standalone) (D)	**41.18%** 14 A	**17.65%** 6	**41.18%** 14	**24.82%** 34
Q7: No online catalog (E)	**66.67%** 6	**0.00%** 0	**33.33%** 3	**6.57%** 9
Total Respondents	76	22	39	137

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Implications/Insights

- Unlikely to achieve universal participation

- Slim majority indicate participation interest

- Given the high percentage of undecided it is possible that with more information you could go higher yet

- Important to consider what level of penetration is needed for it to work

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Implications/Insights

- To overcome doubt there will need to be evidence of sustainability

- The overlay will have to provide tangible improvements in addition to what OCLC delivers

- Those already in consortia, especially LLSAPs, are more likely to participate even though their incremental improvement might be lower

- Listening to the concerns of the limited but vehement number of people viewing this negatively could yield improvements to the overlay

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Functionality

- All functions for library and patrons are valued; but to differing degrees due to type, mission and population served

- Given the wide range of preferences having as much customization at the library level as is feasible is better

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Unexpected insights

- Benefits may go beyond ILL and include creating/enhancing community for mutual support

- Sharing principles may be more important than shared policies as a guide

- Frequent concern for investing in very small libraries may indicate that the overlay should

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Recommendations

- A successful overlay may require a trifecta; improved patron experience, improved library operations and improved information for library operations decisions

- The entire system must be addressed; overlay, delivery, training, marketing, etc.

- Many libraries will need to be convinced by seeing it work

- Begin gathering an interested group of library/consortia types needed to conduct a pilot project

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The Dream of the Future!

ILL should be…

"Just like Amazon; find it, click it, track it, get it… but free!"

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