RAILS Resource Sharing Overlay Project Overview
December 2014

Background

RAILS is researching a potential project to provide RAILS-area library users with seamless access to the four RAILS LLSAPs or shared online catalog consortia (MAGIC, PrairieCat, RSA-NFP, and SWAN), the catalogs of other RAILS consortia, and the catalogs of standalone libraries that choose to participate. This means that RAILS-area library users will be able to search the millions of library holdings in all of these different catalogs all at one time and place. (For additional information about the LLSAPs and other consortia, see the RAILS website at https://www.railslibraries.info/catalogs.)

This is a multiyear project with four major phases:

- Environmental scan to provide valuable information on similar resource sharing projects in other states
- Research into organizational factors that might affect the success of the RAILS overlay project
- Overlay product selection
- Implementation

These four phases are described in greater detail below.

Why an Overlay Project?

RAILS is pursuing an overlay project to greatly enhance resource sharing between RAILS members for the ultimate benefit of Illinois library users. The project will give those users greater and easier access to a wider, richer variety of materials than any one library or library consortium could ever provide.

Several RAILS members have asked why RAILS needs to undertake an overlay project when OCLC WorldCat is available. (WorldCat includes the holdings of thousands of libraries across the world.) While many Illinois libraries participate in OCLC, there is increasing dissatisfaction with service costs and pricing inequities. The RAILS overlay project would allow much broader participation from RAILS libraries of all types and sizes, including libraries with specialized collections whose holdings are not represented in OCLC.

RAILS members have also asked why they would need to participate in a shared catalog consortium if an overlay project existed. A library would still need to make its collection available online to participate in the overlay project. The costs for an individual library to do this are high. Consortium membership is much more affordable because members share expenses. Sharing bibliographic records reduces the need for library staff to find or create catalog records. Centralized servers save libraries precious building space and reduce the need for technical expertise at the library level. Most consortia have highly-trained staff who provide consulting, training, support, and management for the shared system. Consortia members also benefit from problem-solving and assistance from other members.

Finally, there have also been questions about why RAILS is not working toward one, shared online catalog or integrated library system (ILS). Resource sharing within RAILS is not a "one size fits all"

approach. RAILS represents libraries of all types (academic, public, school, and special) and sizes, which have chosen different ILS software to meet their needs. Many libraries belong to one of the eleven different ILS consortia within RAILS. Many other RAILS libraries use standalone systems that are limited to a single building or shared by multiple buildings (e.g. branch libraries or libraries within the same school district).

Most RAILS members have made a huge investment in their ILS software of choice. A number of them have signed long-term vendor contracts and are unlikely to abandon their current ILS to join a single RAILS shared catalog. While RAILS looks forward to and will continue to work towards possible mergers and greater cooperation among all RAILS consortia, at this point in time, the overlay project is the most practical, reasonable, and accomplishable solution. It will allow a library user to search the catalogs of all participating libraries, request an item, and have the item delivered to their home library through the RAILS delivery service.

RAILS Overlay Project Participants

The RAILS Consortia Committee is charged with overseeing a working group that will investigate overlay products that will work across different ILS software and make a recommendation on a product that could serve both consortia and standalone libraries. Members of the Consortia Committee volunteered to serve on this working group, which includes RAILS staff as well as representatives from RAILS LLSAPs, independent ILS consortia, and the LINKin interlibrary loan consortium. (Committee and working group membership lists are available at https://www.railslibraries.info/board/committees.)

Initial work on the overlay project will focus on consortia, because such a great amount of resource sharing occurs between the different consortia. Libraries with standalone ILS systems will receive greater focus at a later date.

Participation in the overlay project will be voluntary, and RAILS members with standalone ILS systems will not be required to participate. Participation by consortia is strongly encouraged, but each consortium will make its own decision.

Similar Resource Sharing Projects

The RAILS overlay project is designed to build on the success of similar projects, including:

- **LINKin library consortium** (http://www.linkin-libraries.org/screens/LINKin.html) – This interlibrary loan consortium includes nine large RAILS public libraries with standalone ILS systems. Customers can independently borrow materials if titles are not owned by their home library or if their library's copy is checked out.
- **Marina consortium** (http://www.sailor.lib.md.us/services/marina) – Maryland's statewide, public library consortium composed of 25 library systems using various ILS software. Customers with a Maryland public library card can request materials not owned by their local public library system.
- **MeLCat** (http://mel.org/melcat) – Michigan's statewide, multitype resource sharing system includes over 430 libraries of all types, including standalones, running multiple ILS systems. MelCat is run by the Midwest Collaborative for Library Services (MCLS).

The existence of these projects demonstrates that RAILS' goal of developing an overlay project is achievable. According to Randy Dykhuis, MCLS Executive Director, "This is a very do-able project. Good solutions exist to do what you want. It will require hard work and the will to collaborate but it can be done."

Four Major Phases of RAILS Overlay Project

Phase One: Environmental Scan
In September 2013, RAILS hired Lori Bowen Ayre of Galecia Group, assisted by Melissa Stockton of Quipu Group, to do an environmental scan of successful implementations of overlay projects in other states. The scan focused on identifying multitype library projects currently in production and utilizing a variety of integrated library systems. The final report was completed in January 2014 and is available at https://www.railslibraries.info/catalogs/overlay.

Phase Two: Research into Organizational Factors
RAILS is currently in phase two of the overlay project, designed to gather input about what RAILS members would like to have in an overlay product, and to identify organizational factors such as governance, administration, finance, staff workload, and resource sharing policies and viewpoints that might affect the success of the RAILS overlay project.

In October 2014, RAILS selected Eric Craymer, President of Growth Management Consulting, Inc., as the organizational consultant to assist with this phase. Randy Dykhuis, MCLS Executive Director, and Debbi Schaubman, MCLS Manager, Shared Library Systems, will assist Eric. MCLS is the Midwest Collaborative for Library Services, which operates the successful MeLCat project mentioned above.

Eric Craymer will conduct three rounds of focus groups with multiple stakeholders to identify aspirations and perceived barriers to the overlay project.

- Round one: Focus groups with the RAILS Consortia Committee and Consortia Futures Subcommittee, Illinois State Library, Illinois Heartland Library System staff, and CARLI (Consortium of Academic and Research Libraries in Illinois) staff. These are scheduled for the week of January 19, 2015.
- Round two: Individual focus groups with each consortium within RAILS, including LINKin. Each focus group will include two sessions, one with board members and/or consortial staff and one with front-line staff with interlibrary loan or circulation responsibilities. Each consortium will have the opportunity to select the participants. These are likely to be scheduled in March 2015. Consortia managers will receive more information in early January 2015.
- Round three: Focus groups with representatives from different sizes and types of RAILS libraries, including libraries with standalone ILS systems. These will be done via webinars and are expected to be scheduled during April 2015. RAILS members who may be interested in participating should watch for more information in RAILS E-News as it becomes available.

Phase two activities will also include a survey of all RAILS member libraries, and member feedback will be sought in other ways as well. Eric Craymer will prepare a final report based on this research, which is expected to be available no later than July 2015. The report will be shared with all RAILS members once completed.

Phase Three: Product Selection
The next step in the overlay project after July 2015 will be to issue a request for proposal (RFP) for an actual overlay product. Phase three will use data from the first two phases to develop specific product requirements. RAILS anticipates using a technology consultant to assist with vendor selection and contract negotiations during phase three. Development of funding and governance plans will also occur during this phase.

Phase Four: Implementation
Detailed implementation plans will be developed after the software is selected. Components will include developing policies and procedures, training, software implementation, and publicity.

Moving Forward
Since RAILS is in the very early stages of the overlay project, there are still many details to work out, such as how the project will be funded. When it comes time to make decisions about funding, a variety of options will be explored, such as applying for grants so as many libraries as possible can participate.

Some members have expressed concern over the sustainability of the project, should there be another state financial crisis like the crisis that led to the 2010 system mergers. While RAILS cannot predict the future financial climate in Illinois, we are committed to moving forward with the overlay project as a top priority. RAILS currently has a financial reserve that will fund over two years of operation. We will continue to exercise careful stewardship of our financial resources so we are able to pursue the activities that will benefit our members and help lead them into the future.

For further information about the overlay project, see the RAILS website at https://www.railslibraries.info/catalogs/overlay or contact Jane Plass, RAILS Associate Executive Director, at jane.plass@railslibraries.info.