

# Categorized Ideas from July 5, 2017

## Consortial Model Working Group Meeting

This list has not been edited for duplications or contraindications. It simply records and organizes ideas shared at the July 5, 2017 meeting. Ideas in different categories may also be related.

### Consortial Landscape

- Any library in the state could join SHARE. SHARE has a Polaris site license with no geographical limitations.
- Don't start a new consortium; build on or adapt existing consortia.
- SHARE could be a statewide solution, though we should be cognizant of geography. We would need to explore the funding model and delivery issues.
- If not in crisis mode, work on an open source ILS solution in order to offer a cheaper solution for individual libraries and consortia.
- Consortia should merge to lower costs.
- LLSAPS should look at a group purchase option for their ILS in the 5–7 year range (one vendor, one contract, even if there are separate LLSAPs).
- RAILS could look at running a formal RAILS “in-house consortium for small libraries.” This could be an existing consortium that’s run as an enterprise fund within RAILS.
  - How do we help more members join consortia, especially outside of Chicagoland area?
- RAILS should provide pricing guidelines for membership
- Figure out a school library solution. Not a new consortium. A school library that leaves a consortium may make an agreement with the local public library that’s still in the consortium. However, this doesn’t reduce the demand for resource sharing, so we need to figure out a way to pay the consortium for that.
- Implement county libraries (but in many cases they don’t have money anyway).
- Continue to encourage mergers, so that there are fewer consortia in five years.
- Connect consortia and standalone libraries with overlay.
- Discontinue SHARE Illinois after overlay is in widespread use.
- Group purchases across consortia (EBSCO, OCLC)
- Look at additional mergers (or acquisitions) of consortia.
- Need geographical boundaries? Based around delivery?

### Levels of Services

- All consortia should offer some sort of baseline offering and have it be cheaper.
- Define what we mean by “resource sharing” at different levels
- What are the criteria for a library’s membership in a consortium? Minimum budget to be automated? What is the minimum level of baseline circulating system?
- Is there a minimum price for a baseline circulating system?
- Fund libraries based on need, not by location.

- LLSAPs need to have minimal level of resource sharing defined so we know what targets we are trying to hit. Union list or circulating?

## Business Plan

- Look for ways to reduce costs of operating an LLSAP (merging, cutting unnecessary costs). Restructure the LLSAP so it's more affordable.
- Libraries should contribute to a reserve fund for their consortium.
- PrairieCat and RSA should build a business plan to move toward sustainability.
- LLSAPs continue down the path of becoming fully self-sustaining.
  - Implement any cost saving or reduced cost ideas as appropriate (i.e. tiered service, OCLC, eliminate multitype). The specifics will be different for each LLSAP, and they know best what will work for them.
  - Goal is to be self-sustaining with no system support in five years, both financial and in-kind.
- Union list membership should go away. Union list libraries don't update their holdings. The baseline should be a circulating system.
- Combine purchasing power across consortia especially for ILS.
- Continue to raise member fees, but need RAILS coverage in case libraries have to drop out of LLSAP.
- Formal relationship between RAILS and consortia
- LLSAPs look at adding value-added services to supplement income.
- Diversify LLSAP revenue; can't just keep increasing member fees.
- Current LLSAPs need to have operations budget that shows full costs without support, including facility cost. Show options for locations. Look at reserves and setting aside one year of operations for emergencies. Put this together (business plan?) by June 30, 2018.
- RAILS should help LLSAPs build business plans (5-year plan). Is RAILS interested in providing in kind services long-term, or is that a business they want to get out of?

## OCLC and Alternatives

- Look at OCLC usage and look at alternatives, including but not limited to SkyRiver.
- Look at the Cataloging Maintenance Center run by IHLS through a grant from ISL; reduce duplication.
- Eliminate the OCLC contract as a statewide purchase. ISL should go to OCLC and negotiate a range of group purchase options that libraries can choose from. Cost based on stats.
- Needs to be some form of bibliographic record sharing in the state. Get support? Have to share.
- Move away from OCLC. Large revenue savings.
- MARC record sharing across state. The overlay or Z39.50 connections could serve as a way to share MARC records.

## System Priorities

- RAILS is moving toward an equity model in funding.

- Resource sharing through LLSAPs and delivery is priority of systems and the Illinois State Library, though these have taken different forms over time.
- RAILS should do nothing that would encourage or cause libraries to drop out of their LLSAP (unless RAILS has plans to implement an alternate solution).
- (Crisis funding) RAILS should focus resources on delivery and maintaining automated libraries.
  - No money for new LLSAPs
  - Reduce RAILS services in other areas as necessary (i.e. consulting, CE, anything non-delivery or LLSAP related)
- (Crisis funding) Prioritize funding for helping resource sharing.
- More messaging about how systems support resource sharing (big picture)
- LLSAP membership grants have been very successful at bringing libraries into LLSAPs; RAILS should continue these and make them a priority.

## Funding Support Model

- Move to competitive grant model in FY2019 for LLSAPs, make it an annual process. We would need to have a transition period to give LLSAPs enough lead time for budget planning.
- Focus resources on supporting LLSAPs until they are self-sustaining; target timeline for sustainability is five years.
- Resources could be financial or in-kind (staff, accountants, etc.)
- RAILS should only fund services for libraries that send materials statewide and participate in resource sharing. If there is a catalog overlay, consortia should pay far less than standalone libraries.
- RAILS should not develop a new shared catalog consortium. Figure out a way to make it affordable to join an existing one.
- Require LLSAPs to do geographical load balancing to help reduce delivery costs.
- Create rating system for need and tie RAILS support to that (needs assessment, stats, budget, surveys to consortia; gather data like per capita grant applications).
- Consortia should develop a membership fee formula that can be used by all consortia. Puts everyone on a level playing field.
- RAILS should continue LLSAP funding over next five years using the current formula. At five years implement new plan; work on that plan over the next five years.
- Move to a competitive grant model. Have to reduce the complexity of the LLSAP/RAILS relationship. Financial support is easier to continue than in-kind support.
- RAILS should encourage use of the overlay through subsidies.
- Consortia that get RAILS funding should open up their databases for record sharing.
- Criteria should include ease of use for ILL and reciprocal borrowing.