RAILS
REACHING ACROSS ILLINOIS LIBRARY SYSTEM

March 14, 2022

TO: **RAILS Consortia Committee – LLSAP Sustainability Working Group**
FROM: **Anne Slaughter**
SUBJECT: **Assessment of RAILS-supported resource sharing options – automation considerations for libraries**

This memo includes draft thoughts on how RAILS can best support libraries' assessment of their resource sharing options, with a focus on RAILS-supported options. This is in response to the working group's discussions of LLSAP affordability, the potential issues that can arise when a library cannot afford or is otherwise not well suited for LLSAP membership, and measures RAILS can take to ensure that our members have the tools they need to make informed decisions about their automation and resource sharing options. We look forward to hearing your feedback on this direction. We have also hit some stopping points regarding data that Grant Halter will join us to discuss and seek input on.

Objectives

- Sustainably maximizing resource sharing participation for each individual library within the most suitable automation and resource sharing solutions
- Providing support for a comprehensive and realistic assessment of whether LLSAP membership is the best decision for an individual library
- Reframing the decades-long narrative that all libraries should be in LLSAPs, and presenting Find More Illinois as an alternative resource sharing solution, with an understanding that some libraries will never join a shared catalog
- Conveying an understanding of RAILS-supported resource sharing options for member libraries

Deliverables

- **A guide to RAILS-supported automation solutions to assist libraries in evaluating their options.** The guide's starting point will be nonautomated libraries, but it can be used by libraries in any automation situation. Potential content is summarized below, including a listing and comparison of automation and resource sharing options, an annotated list of the necessary components of automation, and information regarding useful data points for the library to use in their investigation. The guide will be posted on the RAILS website for independent use, paired with the Catalog Membership Grant as a pre-requisite for application, and provided to LLSAP Directors for their own use in conversations with potential libraries.
- **Revisions to the Catalog Membership Grant application process and form**, reflecting updated criteria and the requirement that libraries use the guide to fully evaluate their automation options.

Components of Guide to RAILS-supported Resource Sharing Options

List of options

Note: Pending further development of a free Verso option with Auto-Graphics, as well as the newly developing investigation of a RAILS-wide or statewide solution. Will likely include a basic comparison chart with categories to be determined.

- LLSAP membership
- Standalone catalog connected to Find More Illinois
    - Verso discount/free – streamlines Find More Illinois participation
    - Other low-cost options *(Note: to include a short list of reasonable options)*

Necessary components of automation

- MARC records – ongoing cataloging and maintenance, according to RAILS or LLSAP cataloging standards
- Patron records – appropriate data collection practices and ongoing maintenance
- ILS maintenance – basic understanding of software and need for ongoing support
- Finances – buy-in from governing/administrative body, a plan for sustaining the solution when fees increase
- Ancillary costs – receipt printers, library cards, barcode and call number labels

Useful data points for library assessment

We'd like to provide a guide to data that would be helpful for a library to use in determining what they're able to afford, and other factors they should look at in assessing their most suitable option. Ideally, this would be accomplished using easily attainable data along with guidance in the form of thresholds or other indicators of affordability, from which the library can make meaning. This has presented quite a challenge, primarily due to inconsistencies in fee formulas, service offerings, overhead costs, and disproportional library investment in fees both across and within LLSAPs. We also believe that we do not currently have the data points needed to observe potential patterns that could then be used to identify useful indicators of affordability. Grant is going to describe this in more detail at the meeting, and share some thoughts on next steps.

Revised criteria for Catalog Membership Grant

These criteria will be incorporated into an upcoming revision of the Catalog Membership Grant application. Revised criteria may be phased in over more than one fiscal year, depending on our approach to the data-related questions.

- Active engagement with the LLSAP director as a first step for a library considering LLSAP membership, including an analysis of the services offered and their costs compared to the library's current solution
- For nonautomated libraries: Confirm that library has planned for all necessary components of automation; this will have internal aspects and aspects that require consultation with LLSAP Director
- Investigation of all automation and resource sharing options based on the library's circumstances, via the RAILS-produced guide, including data assessment
- Understanding of all costs involved, and that membership fees may increase
- Understanding of responsibilities under LLSAP IGA or other membership requirements
- Understanding of the ways membership is subsidized by RAILS direct support to the LLSAP
- Confirmation by LLSAP Director that library fits their own membership criteria and is approved for membership *(Note: a version of this is in the current application but can be strengthened)*