EZBorrow Futures Task Force
2024 Report and Recommendations

Last Updated June 4, 2024

Executive Summary

The EZBorrow Futures Task Force (EZBTF) is a cross-sectional group of PALCI library decision-makers, resource sharing, collections, and library technology leaders, functional experts, and practitioners, charged with exploring and recommending directions for the future of the consortium's consortial resource sharing services. From September 2023 through early 2024, the EZBTF considered PALCI's goals, examined recent and developing opportunities and challenges in the consortial collections sharing landscape, surveyed PALCI members, and facilitated several focus groups in order to articulate member needs and identify an approach that would add value to EZBorrow in support of PALCI's mission.

Despite a recent downward trend and decrease in physical borrowing and lending volume in EZBorrow that has reduced borrowing activity by nearly half of what it was in pre-pandemic years, PALCI members continue to highly value PALCI's consortial sharing program for physical collections. Members widely agreed that EZBorrow is most distinctive for the efficiencies the service brings to library staff in identifying lenders, the speed of delivery, and the consistency of shared policies it supports in borrowing and lending. PALCI libraries that are currently using the service indicated they want it to continue to be optimized, and don't want to lose what they value about this service.

And yet, tension exists with a variety of environmental, social, market-based, technological, and organizational factors indicative of the importance of innovating methods for access and sharing, improving service to patrons, and supporting the sustainability of sharing. PALCI libraries widely agreed that PALCI should pursue opportunities for expanding delivery methods, reducing shipping costs, and creating opportunities for use of resource sharing data to more effectively inform collection management, to support a healthy resource sharing ecosystem, and to drive prospective collections acquisition.

Keeping in mind EZBorrow's distinctive value for its members, PALCI should facilitate a balanced and cohesive ecosystem-based approach to the future of its resource sharing programs and services, in order to continue to sustain support and prioritize the success of its physical item resource sharing services, while at the same time enhancing sharing capabilities with expanded sharing opportunities and new functionality that will support digital lending.

EZBTF Recommendations

In pursuit of this balanced and cohesive approach, the EZBTF now puts forward the following recommendations and strategic directions as guidance for furthering PALCI's organizational goals and mission in the coming 1-3 year period. The EZBTF further suggests that PALCI continuously evaluate, monitor, participate in, and leverage development initiatives happening in the ReShare community to support these aims.

1. *Continue to work with Index Data, the ReShare community, and EZBorrow users to advocate for improvements and optimize EZBorrow's ReShare Returnables platform. Focus these efforts on optimizing, enhancing, and streamlining the user experience for staff and patrons in partnership with the ReShare open source software community.*

2. *Prioritize non-returnable digital book chapter lending as PALCI's first foray into digital lending to enhance EZBorrow services and save on shipping costs.*
   > *This effort should include the development of a feasibility study, including financial resourcing requirements to support required development efforts, user stories, and plan for a proof of concept for digital book chapter lending, working through the ReShare community and making use of the EZBorrow platform and its recent controlled digital lending development efforts. The EZBTF recommends charging a new task force to gather these member requirements, metadata needs, technical requirements, and make recommended shared policies and approaches for book chapter lending.*

3. *Gather data on member expenditures, facilitate discussions, and seek feedback from PALCI members to discover new ways to enhance collaborative efforts regarding resource sharing products and services. This involves exploring options such as joint advocacy, implementing best practices, and/or centralizing licensing approaches for technologies and services such as RapidILL, OCLC, ILLiad, and ILS systems, among others, to complement and enhance PALCI's existing resource sharing initiatives.*

4. *Continue efforts to expand strategic eBook licensing and acquisitions among PALCI members;*

5. *Facilitate engagement, including staff time and financial resourcing, directly with and through the Project ReShare community to support the development of whole eBook ILL opportunities.*
   > *Consider other existing opportunities provided by ReShare to support optional services for controlled digital lending, and other related digital sharing initiatives through ReShare Digital.*

6. *Working with Index Data as ReShare service provider to pilot the implementation of a standard feed to support discovery integrations between EZBorrow and local systems.*
7. *Leverage PALCI's shared index, print retention data, and resource sharing usage data as a tool for collaborative collections decisions in support of a healthy resource sharing ecosystem, which includes developing a set of prioritized user stories and development of shared approaches to collection management.*

With a longer-term horizon (3-5 years), the EZBTF also wants to ensure that PALCI continues to expand borrowing and lending capabilities by:

8. *Creating options to expand the EZBorrow borrowing network to include other borrowing networks, beginning with ReShare partner organizations to allow a request to seamlessly move to another borrowing network if it cannot be filled in EZBorrow.*
9. *Pursuing other forms of non-returnables and digital lending services with community-owned software, including article lending and special collections sharing functionality.*
10. *Continuing to evaluate and consider other new and developing opportunities to re-allocate library spending toward strengthening collaboration options and members' sense of agency.*

The EZBTF wishes to thank the board and PALCI members for the opportunity to work together on this charge and welcomes member feedback on the recommendations they offer for this core PALCI program and service. PALCI EZBTF Members include:

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