PALCI™

Partnership for Academic Library
Collaboration and Innovation

Please complete this application for PALCI membership and send it via email to Jill Morris, PALCI Executive Director, at support@palci.org. The PALCI Membership Committee and Board of Directors will consider your application within 90 days of receipt. **Please complete all fields - incomplete applications will not be accepted.**

Institution

Institution Name

Library Name and Address

Library Website

Library Director

Name

Title

Voice

(   )

Email

PALCI Voting Representative *(if other than Library Director)*

Name

Title

Voice

(   )

Fax

(   )

Email

Library Details

Library's Fiscal Year (Check One)

☐ July–June ☐ January–December ☐ Other: _____

IPEDS Institution ID Number (if applicable)

IPEDS ID Number is available online via: https://nces.ed.gov/ipeds/datacenter/InstitutionList.aspx?goToReportId=6

In the sections below, provide information & activity levels for your library's last full fiscal year.

Current Collection

	Titles	Volumes
Library Collection		
Circulating Monographs		

Library Budget *(total library budget for the last full fiscal year including personnel)*

Fiscal Year:	
Budget:	

Materials Budget *(using the NCES definition for library materials, show for last full fiscal year)*

Fiscal Year:	

	Budget
Serials	
Monographs	
Electronic	
TOTAL	

MEMBERSHIP APPLICATION FORM

Population Served *(Patron information)*

Fiscal Year:

	# of Served
Student FTE	
Undergraduate FTE	
Graduate FTE	
Non-degree FTE	
Student headcount	
Institution Faculty FTE	
Institution Staff FTE	

Library Staff

Fiscal Year:

	# of Staff
MLS Professional FTE	
Non-MLS Professional FTE	
Support Staff	
Student FTE	

Integrated Library System

Vendor	
System Name	
Version	

Circulation and Resource Sharing

Library Circulation and ILL

Fiscal Year:

	Loans	Borrows
Circulation: *# of items circulated to library patrons (not including in-house reserves, etc.)*		
ILL: *# of items loaned through ILL (returnables)*		
ILL: *# of items loaned through ILL (non-returnables)*		

ILL Courier/Shipping Service

Is the library currently a member of IDS-PA delivery service?

☐ Yes ☐ No Annual Shipping Level: _____

What other courier/delivery services does the library use?: _____

ILL Systems

Which ILL system is the library currently using? Check all that apply.

☐ RapidILL ☐ OCLC ☐ Illiad List Others: _____

Expression of Interest in Membership

How did you hear about PALCI Membership?

MEMBERSHIP APPLICATION FORM

Please provide a statement of interest. What is important to you about membership in PALCI and what prompted you to apply? How do you anticipate benefiting and contributing to the consortium?

What unique qualifications, expertise, experience, or other contributions (including, but not limited to, specific collection strengths or human resources and areas of expertise) will the library bring to membership in PALCI?

Which of the following types of materials will the library lend to PALCI members?

- [ ] Popular Reading
- [ ] Music Scores
- [ ] Sound Recordings
- [ ] Film / Video
- [ ] Microforms
- [ ] Special Collections

List Others: _____

In which PALCI services does the library intend to participate?

- [ ] EZBorrow*
- [ ] Leadership / Advocacy
- [ ] Professional Development
- [ ] RapidILL Pod
- [ ] Educational Events
- [ ] Cooperative Collections
- [ ] eResources
- [ ] Committee / Task Force Work
- [ ] Networking with Colleagues
- [ ] Hyku Repository Services

List Others: _____

*Included in Dues

What else should PALCI members know when considering your application?
You may include any other expectations around your library's upcoming plans, staff capacity, the library's unique contributions, how you expect to participate, as well as any other consortia to which the library belongs and how you expect membership in PALCI may intersect with those other consortial arrangements.

I have read and received PALCI's current EZBorrow Policies, Financial Policy, Membership Agreement, and received information about membership dues.

Signature of Library Director

Date application completed: _____

In addition to the information provided on this form, please complete the supplemental self-evaluation document on the following pages to support the library's application for membership.

Applicants are encouraged to provide as much information as possible in order to aid the committee and PALCI's voting representatives in evaluating the library's opportunity to both contribute to and derive value from PALCI for a successful long-term partnership.

I would like my library to be considered for conditional membership in PALCI, with delayed implementation and fees related to EZBorrow. By checking this box, I am indicating that I do not expect to be able to implement and use EZBorrow within the first year of PALCI membership and wish to delay implementation and payment until a later date. I acknowledge and accept the terms of conditional membership, which provides a postponement in payment of EZBorrow related-fees. By the start of my library's fourth full year of membership, my library is expected to pay all EZBorrow related fees as part of dues in order to remain a member in good standing. If you select this option, please detail your justification and estimated start date in the supplemental application.

Thank you for considering membership in the PALCI Consortium!

PALCI Membership Criteria & Supplemental Application Materials

Approved by the Board on September 19, 2023

PALCI's primary mission is to enable cost-effective and sustainable access to information resources and services for academic libraries in Pennsylvania and surrounding states. The PALCI partnership is grounded in resource sharing among diverse partners, where resource sharing is broadly defined to include the sharing of collections, both physical and electronic, people and expertise, technology, innovation, and library infrastructure, as well as the sharing of financial and other resources to further meet the evolving needs of partner institutions. See [PALCI's Strategic Outline](#) for information about how the consortium approaches its work.

PALCI membership is open to all not-for-profit academic institutions (4-year/baccalaureate) and not-for-profit research libraries that are located within Pennsylvania and contiguous states.

Upon joining, each member library retains autonomy over its staff, operations, and budget. However, membership in PALCI requires collaboration and commitment to the PALCI partnership, demonstrated through active engagement in and support for PALCI initiatives, programs, and services to the fullest extent possible.

The PALCI membership committee reviews all member applications for alignment with PALCI's mission, vision, and values, and takes into consideration the institution's stated goals, as well as PALCI's evaluating criteria. Applicants should address each of the criteria categories in their application with a demonstration of capacity for and willingness to participate for fullest consideration. PALCI evaluating criteria was designed to support the committee's ability to understand the applicant's potential for value derived from PALCI, as well as the value and contributions the applicant will make to the partnership.

Applications recommended by the Membership Committee will be made available for comment to all PALCI voting representatives, followed by a vote by the Board per PALCI's membership application process (available at https://palci.org/about/members/apply).

Identifying the Value of PALCI: Success Indicators & Evaluation Criteria for PALCI Membership Applications
Considerations for self-evaluation by applicants and prospective PALCI members

The PALCI Membership Committee strives to strategically admit institutions that will support bi-directional, mutual value propositions to the PALCI partnership. The categories below are designed to support the applicant in considering the value of PALCI membership for your library as you develop your library's application, and to support the Membership Committee in evaluating and anticipating applicants' ability to both derive value from and contribute value to PALCI's partnership.

At a minimum, each new partnering institution must have:
- At least one full-time library employee with an accredited advanced degree in library science or an equivalent related advanced degree, as well as
- An integrated library system (ILS) or equivalent system that is able to interface with PALCI's EZBorrow resource sharing platform

Each category below is broken down into specific aspects to further elicit detail and feedback from applicants.

NOTE: The categories below are <u>not</u> intended to serve as membership requirements. There is <u>no</u> expectation that all member institutions will be able to demonstrate or excel in all areas outlined below. Rather, PALCI aims to aid prospective members in completing their applications by articulating the value their institutions seek and bring to membership, and to support the membership committee in articulating and identifying how diverse institutions will bring different strengths to the PALCI collaboration.

Applicants are asked to address all questions in the application, and to address any perceived challenges your organization may face in fully participating or contributing value to PALCI in the context of the areas outlined below.

1. **Alignment of institutional priorities with PALCI's mission, vision, values and current or anticipated programs/services**

   Consider and demonstrate the ways your library /institution aligns with PALCI values and approaches in your statement of interest or other library-provided materials included in your application. If applicable, why/how is PALCI perceived to be distinctive from your other consortial membership options?

2. **Budget & Finance**

   Consider/Discuss your library's:
   - *Ability to sustainably support PALCI membership dues*
   - *Capacity to participate in optional strategic collaboration programs and offerings*

3. **Collections Sharing**

   Consider/Discuss your library's:

   - *Commitment and readiness to begin using EZBorrow – i.e., estimated date you expect to be able to implement; load holdings into EZBorrow shared index, updating at least 1–2x annually or more; staff capacity for resource sharing, etc.*
   - *Evidence of shareable physical collections*
   - *Technical/Systems capacity for resource sharing integrations with EZBorrow*
   - *Budgetary capacity for and interest in other resource sharing channels e.g., RapidILL participation*
   - *Staff capacity for participation in resource sharing committees by staff (e.g. monthly online meetings)*

4. **Licensing and Participation in Strategic Collaborative Collections Efforts**

   Consider/Discuss your library's:
   - *Sufficient budget and organizational support available for participation in strategic group licensing/content curation via PALCI (1 offering per year)*
   - *Sufficient/steady/growing budget for materials*
   - *Demonstrated interest, willingness, and plans to participate in strategic collaborative collections offerings*
   - *Staff capacity to consider strategic offers, and participate in feedback gathering exercises and collections community conversations*

5. **Library Innovation & Community-owned/Open Infrastructure**

   Consider/Discuss your library's:
   - *Capacity, interest, and willingness to take part in PALCI innovation efforts, e.g., Hyku pilot, CCLP, developing new licensing modalities and business models, etc*
   - *Support for or participation in innovative initiatives*

6. **Community Engagement, Leadership, and Governance Participation**

   Consider/Discuss your library's:
   - *Interest, willingness, and plans to participate in PALCI events and programs, and networking opportunities, e.g., Attendance at virtual and in-person Deans & Directors meetings*
   - *Willingness to serve (or commit the time of staff to serve) on the Board, committees, and working groups*

7. **Institutional Support**

   Consider/Discuss your library's:
   - *Support for PALCI membership within the wider organization/institutional context*
     - *Example: Letter of support from Provost or Chief Academic Officer; Dedicated budget; Part of annual strategic plans*