PALCI
Partnership for Academic Library Collaboration and Innovation

PALCI Digital Sharing Strategy

Intended Audience

This document is intended to build common understandings and foster conversations around digital sharing for use by the staff of PALCI Member Libraries and digital sharing ecosystem partners, including technology and content providers, publishers, and open source software communities.

Preamble

PALCI is a regional resource sharing consortium with a mission to enable cost-effective and sustainable access to information resources. For 25 years, PALCI's EZBorrow consortial sharing service has been essential in expediting the sharing of physical collections among its members. No library can collect everything, and EZBorrow enables libraries to support one another as trusted institutions in filling gaps, providing necessary resources to user communities, and augmenting collections.

As libraries increasingly prioritize digital-first acquisitions, PALCI intends to enhance its EZBorrow service offering to meet the current and future needs of its member libraries. The EZBorrow Futures Task Force outlined a series of recommendations for the service in its 2024 EZBorrow Futures Task Force Report and Recommendations, including **the need for development of whole ebook interlibrary loan capabilities, book chapter lending, and support for other digital sharing initiatives through involvement in the Project ReShare Community**. While there was broad need and support expressed for the development of such sharing capabilities, marketplace options and shared policies and practices are limited, or do not currently exist to meet these needs.

Purpose

This Digital Sharing Strategy is intended to be both an aspirational vision and a practical guide for developing PALCI's digital sharing capabilities, with the goal of improving cost-effective and efficient access to information. The strategy outlined below is PALCI's attempt to articulate member library needs, guiding principles, and our desired approach to the ecosystem partnerships and models required for digital sharing. It is understood that not all the outlined goals can be accomplished at once, and that digital sharing may not always be the best approach for the library or end user in each case. The outcomes of this effort are designed to articulate a desirable future state of sharing that will equip libraries with the tools, technologies, processes, and insights needed to support digital sharing when it is advantageous.

Over the next 1–2 years, PALCI will develop and implement a digital sharing roadmap, along with a series of proof-of-concept initiatives and pilot projects based on this strategy. These efforts will help identify and advance the most effective paths forward, **with a strong focus on cost containment and sustainable practices**.

Digital Sharing Strategy

I. Foundational Principles

a. **Vendor neutral, standards-based sharing technologies and systems are essential to collaboration** among libraries. PALCI member libraries desire a library-owned, standards-based, vendor-neutral ecosystem for the efficient sharing and accessing of owned or shareable content. Grounding our approach to digital sharing in current international standards ensures that it remains both vendor-neutral and platform-neutral.

b. **Equitable, Easy Access:** Ebook lending should be as seamless as print lending for both users and staff, adhering to interlibrary loan guidelines. **If we own it, we loan it*.**

c. **Metadata as Infrastructure:** Metadata is the backbone of libraries. To support efficient digital sharing, it must be standardized, machine-readable, and able to represent entitlements and digital lending options. This enhances exchange, ensures access, and enables both positive user experiences and confident staff workflows.

d. **Flexibility and Scalability:** There is no single model for digital sharing. Systems must remain flexible to address the unique needs of libraries while scaling to serve PALCI members and the broader resource sharing ecosystem effectively.

e. **Collaborative Wins:** Stakeholders will benefit in different ways from digital sharing enhancements; the PALCI consortium, libraries, publishers, information providers, and other industry partners share many common values with mutual interests. In developing a PALCI Digital Sharing Strategy, **PALCI should seek out mutually beneficial wins whenever possible**, resulting in “Win-Win-Win” outcomes.

**This is an aspirational approach. Ownership and licensing may take many forms, and libraries need the flexibility to make decisions that best fit their needs.*

II. Value Proposition

a. For Libraries in PALCI

A formalized approach and EZBorrow program for digital sharing among PALCI libraries will improve efficiency, access, usability, and financial sustainability by enabling member libraries to meet the growing demand for digital content through automated, scalable, and interoperable systems. It enhances data-informed collection development and purchasing decisions, fosters a better end-user experience, and supports libraries in meeting patron needs while leveraging rather than duplicating existing investments. Libraries are seeking:

i. **Improved Access**: Seamless digital delivery of complete digital items (e.g., a whole eBook as opposed to a single chapter or subset of chapters) that will meet user expectations in a landscape where collections are increasingly digital.
ii. **Usability**: End-user and staff workflows that are optimized to save time and improve user satisfaction.
iii. **Sustainability**: Digital sharing that will not be a substitute for purchasing but a complement to it—driving smarter, collective, data-informed acquisitions and leveraging ownership strategies at scale to meet libraries' budgetary realities.

b. For Publishers and Content Providers

Digital sharing offers the potential for enhanced usage data, new partnership opportunities, and expanded sales pipelines, informed by clear signals of user demand. PALCI's Digital Sharing Strategy means publishers may gain:

i. **New Market Signals**: Resource sharing data that informs purchasing and licensing decisions at both local and consortial levels.
ii. **Financial Sustainability:** Models built around collaborative access and usage that can create recurring and justifiable revenue streams.
iii. **Copyright Protection**: Stronger partnerships with libraries to empower legally permissible sharing of materials that safeguard publisher content while also promoting access to information.
iv. **Expanded Reach and Visibility**: Partnering in PALCI's trusted ecosystem increases exposure of content across more institutions, especially for independent and smaller publishers lacking other mechanisms, creating future purchasing opportunities and new models for library investment.

III. Strategic Goals for PALCI Digital Sharing

a. Center the End-User Experience & Improve Staff User Workflows for Efficiency

i. Provide patrons with opportunities to make informed choices about format and availability when they request and gain access to the research and information they desire

ii. Ensure the staff user experience scales to support consistently excellent end-user experiences

iii. Deliver whole digital items (e.g., whole ebooks) at scale, when feasible and desired

iv. Provide a digital interlibrary loan experience that mirrors the effectiveness of physical lending—frictionless, fast, and patron-friendly.

b. Inform Purchasing, Not Replace It

i. Use digital sharing data to guide purchasing and collective collection strategies, creating feedback loops between access and ownership.

c. Foster Ecosystem Collaboration

i. Promote transparency and shared understanding among stakeholders, including libraries, content providers, and vendors, to support mutually beneficial digital sharing solutions.

d. Support Standards and Openness

i. Advance system and metadata interoperability, emphasizing standards-based integration and open metadata rights as essential infrastructure.

ii. Ensure that all systems are designed to meet established accessibility standards to the maximum extent possible in order to foster inclusivity, enabling access for all users. This requirement extends to all facets of system design, including both the staff-facing and end-user interfaces.

e. Pursue Open Metadata Policies

i. Allow libraries to "use, re-use, adapt, aggregate, and share metadata that describes library collections to serve the public interest, without restriction or limitation," as articulated in the ICOLC Joint Statement on the Metadata Rights of Libraries: https://icolc.net/statements/joint-statement-metadata-rights-libraries

ii. Encourage PALCI members to adopt open metadata policies, such as those implemented by Stanford University Libraries. This includes a commitment to openly share and reuse metadata to support research and scholarship, releasing it under a CC0 license, and advocating for open infrastructure and collaborative projects that ensure unrestricted use of metadata.

f. **Ensure Scalability**
   i. Develop replicable workflows, business models, and licensing approaches adaptable across diverse consortia and library types.
   ii. Focus on staff/patron workflows, discovery and delivery mechanisms, and sustainable technology and licensing models.

IV. Leveraging our Strengths

a. **EZBorrow, powered by ReShare software**: PALCI's trusted consortial sharing service and software implementation that delivers high-value, efficient physical resource sharing on a platform that allows for innovation and community co-investment.

b. **Project ReShare**: A group of partnering organizations that are building and maintaining a community-driven, open-source software platform and approach to resource sharing, which can be enhanced to extend support for digital sharing and expanded to support cross-consortial opportunities.

c. **PALCI's Consortial EZBorrow Network and Partnerships**: PALCI members, including EZBorrow practitioners, operate on a foundation of shared values, continuously earned mutual trust, and collaborative infrastructures to support shared collections, licensing, governance, and innovation. Additionally, PALCI leverages its position as a leader among library consortia by building strong, trusted relationships to harness the power and distinctive strengths of partnering organizations whenever possible.

d. **Governance and Community Engagement:** Trust-building through transparency, clarity, and shared direction-setting among libraries, vendors, and other ecosystem players

V. Resource Needs and Gaps

To fully enable and scale digital sharing, the following strategic resources and investments are required:

a. **Sufficient Metadata Infrastructure:**
   i. Strengthen metadata standards to support digital lending workflows.

ii. Alignment with ICOLC's Joint Statement on Metadata Rights to empower libraries to use, reuse, adapt, and share metadata without restriction

b. **Digital Sharing-Friendly Collaborative Licensing Models:**
   i. Business models and license terms must reflect consortial investments, avoid duplication, and respect libraries' stewardship obligations
   ii. Digital sharing via interlibrary loan is not a replacement for purchasing. Approaches to digital sharing should DRIVE and INFORM future purchase decisions and enhance libraries' data-informed decision making with respect to acquisitions. This approach allows PALCI to explore and create opportunities for consortial ownership level collecting rather than solely relying on small-scale distributed ownership and subscription-focused aggregations.

c. **Technology Enhancements:**
   i. Advance the Project ReShare platform and complementary infrastructures with a focus on interoperability, vendor neutrality, user experience improvements, and cross-consortial collaboration.

2025-27 Digital Sharing Objectives

In the first phase of advancing the strategy and goals outlined above, PALCI will collaborate with its Board, member institutions, staff, and key partners to design and implement digital sharing initiatives and proofs-of-concept. These efforts will focus on aligning resources and driving projects that achieve the following objectives over the next 12-24 months:

1. **Build Partnerships and Test Digital Sharing Models**: Identify and pursue active partnerships with key stakeholders across PALCI's open source and open infrastructure initiatives. These partnerships will advance the development of technology and tools for digital sharing, aligning with this strategy to demonstrate digital sharing capabilities among a willing subset of PALCI member organizations. These include, but are not limited to:
    a. Project ReShare: Advance the ReShare Digital initiative by defining digital sharing functionality requirements, pursuing needed resources, and engaging in pilot projects to test the software.
    b. CrossLink: Evaluate the viability of CrossLink to facilitate cross-consortial lending when integrated within PALCI's EZBorrow (ReShare) infrastructure.
    c. ShareVDE: Test the effectiveness of open metadata practices within the context of Linked Open Data to enhance patron discovery services and collaborative metadata management.

2. **Engage Directly with Publishers:** Engage publishers who are genuinely interested in forming true partnerships to support ebook lending and digital sharing. These partnerships will be supported by direct conversations that foster mutual understanding and demonstrate the value for everyone involved. In particular, we would like to test digital sharing capabilities with initial partners that are:
    a. Publishers that have their own platform and manage their own environments
    b. Publishers that lack their own platform and would like alternative delivery mechanisms that are lightweight and expand exposure to their content

3. **Develop Sustainable Business Models:** Pursue collective purchasing opportunities and technical solutions that enable libraries to gain digital-sharing-friendly rights and functionality, with preferences for opportunities that
    a. Prioritize one-time payments, avoid per-loan fees, and ensure interlibrary loan rights without transactional costs.
    b. Develop sustainable business models that are based on technical functionality rather than per-loan fees, thereby leveraging existing investments and preventing duplicate payments for already purchased content.

   c. Ensure that libraries do not pay transactionally in order to exercise interlibrary loan rights within PALCI and beyond.

4. **Develop Sustainable Licensing Models:** Articulate clear licensing language and model terms for digital sharing among PALCI members and beyond.
   a. Establish best practices for licensing and copyright to empower confident sharing decisions.
   b. Leverage language from libraries that already use this language in their licenses.
   c. Ensure a shared understanding of licensing terms and encourage all PALCI members to use similar licensing language for digital purchases.

5. **Expand Metadata and Discovery Capabilities:**
   a. Identify ebooks eligible for full lending and ensure metadata is machine readable to support discovery and use at the item level.
   b. Partner with the international metadata standards community to establish machine readable metadata standards that identify loanable vs. non-loanable digital items.

6. **Enhance Library Staff and Patron Experiences:** Build out capabilities within existing PALCI/EZBorrow channels to pilot support for the discovery and use of digitally shareable items with a focus on:
   a. Library staff efficiency
      i. Develop cross-platform integrations to minimize duplicate requests across different interlibrary loan systems.
      ii. Establish licensing and copyright best practices that enable EZBorrow practitioners to make informed lending decisions, along with platform integrations that facilitate staff in managing copyright efficiently.

   b. End user experience
      i. Create a request process/request form that enables patrons to actively select and be informed of the format they are requesting, and allows patrons to indicate whether they will accept an alternative format.
      ii. Ensure clear opt-in from patrons on format preferences (e.g., e-book vs. print) and consider the financial impacts on libraries when presenting format options to patrons.
      iii. Facilitate patron authentication through each institution's Single Sign-On (SSO)
      iv. Accessible interfaces