



PALCI™

Partnership for Academic Library
Collaboration and Innovation



GUIDE

PALCI Guide to Interoperability and System Selection

A guide to help PALCI member libraries evaluate library systems and vendors against open interoperability standards during selection and procurement.

RELEASED
August 2026

VERSION
1.0

PREPARED BY
PALCI Staff

This abbreviated version is available publicly at <https://palci.org>; the full guide, with supporting documents and additional detail, is available to PALCI members through the Member Portal in Basecamp.

Executive Summary

Interoperability is foundational to PALCI's ability to deliver sustainable, cost-effective, and trusted collaboration among member libraries. It enables diverse library systems and services to work together predictably using shared standards, allowing member institutions to retain local autonomy while participating fully in consortial programs.

As libraries face increasing financial pressure, technical complexity, and staffing constraints, interoperability allows PALCI members to share infrastructure, reduce duplication, and extend the value of local investments. Standards-based systems support resource sharing, discovery, circulation, and data exchange without requiring uniform platforms or excessive local customization.

PALCI's commitment to interoperability advances several strategic priorities:

- **Sustainability and affordability** with scaled shared infrastructure and reduced vendor dependency
- **Innovation with reduced risk** by enabling pilot projects and shared development
- **Trust and transparency** through open standards, documented integrations, and shared governance
- **Equitable access** by ensuring all members can participate in consortial services regardless of local system choice

Services such as EZBorrow and ReShare demonstrate how interoperable infrastructure translates directly into improved access, faster fulfillment, and measurable consortial value. The same foundation will support emerging services, including open metadata sharing and the expansion of EZBorrow into ebook lending and other forms of digital content delivery. By prioritizing open standards and collaborative governance, PALCI positions its members to adapt to future developments without abandoning existing systems.

Interoperability is not only a technical requirement. It is a strategic investment that strengthens PALCI's collective capacity and supports long-term collaboration among member libraries.

Key Takeaways for Decision Makers

- **EZBorrow is foundational infrastructure.** It is supported by member dues and powered by ReShare, a standards-based platform selected to ensure broad interoperability and long-term flexibility. It is the building block of several future initiatives that will rely on interoperability. Any system choices made by PALCI member libraries should comply with open standards and facilitate interoperability with EZBorrow.
- **Interoperability is a strategic investment,** not just a technical consideration. It directly supports sustainability, affordability, and long-term institutional flexibility.
- **Local choice is preserved.** Member libraries can select systems that meet their needs while remaining fully connected to PALCI services when interoperability is prioritized.
- **Shared infrastructure reduces risk and cost.** Standards-based integrations extend the value of existing investments and lower staffing and maintenance burdens.
- **Consortial value is measurable.** Interoperable systems enable improved access, faster fulfillment, and clearer demonstration of collective impact.
- **Future readiness depends on today's standards.** Open, well-governed interoperability positions libraries to adopt emerging services such as open metadata sharing and consortial ebook lending without disruptive reinvestment.
- **ILS migrations affect consortial participation.** Libraries should consult PALCI staff before selecting a new ILS to confirm compatibility with EZBorrow and understand migration costs and timeline.

PALCI Guide to Interoperability and System Selection

1. Interoperability and PALCI's Mission

PALCI advances innovation in member library collaboration by building partnerships that deliver sustainable, cost-effective access to shared resources and services. Transparency, operational excellence, and mutual respect are central to this work.

Interoperability supports this mission by allowing library systems to exchange information in predictable, standards-driven ways. It enables reliable collaboration across institutions, reinforces trust through documented and privacy-respectful data exchange, and reduces the technical burden of cooperation.

PALCI member libraries rely on a diverse mix of local systems for both institutional operations and consortial services. When these systems interact reliably, libraries gain efficiency, control costs, and deliver more seamless experiences for students, faculty, and staff.

2. What PALCI Means by Interoperability

At PALCI, interoperability means that library systems can communicate reliably and securely while preserving institutional choice. It is achieved through open standards, documented interfaces, shared governance, and active collaboration among members and partners.

Interoperability enables collaboration without requiring uniformity. Libraries may select local systems that meet their institutional needs while remaining connected to a shared ecosystem that supports resource sharing, discovery, and coordinated service delivery.

In practice, interoperability allows libraries to:

- Share collections across institutional and vendor boundaries
- Participate fully in consortial services regardless of local system platform
- Adapt to system changes or migrations with reduced disruption
- Contribute to shared innovation without duplicating effort

3. Why Interoperability Matters

Academic libraries face mounting financial pressures, increasing technical complexity, and reduced staffing capacity. No single institution can address these challenges independently. PALCI exists to help libraries work collectively toward sustainable, collaborative solutions.

Interoperability directly supports PALCI's mission to enable cost-effective and sustainable access to information resources and services. It also advances PALCI's vision to be a trusted and preferred partner for academic library collaboration and innovation.

3.1 Sustainability and Shared Infrastructure

Interoperability strengthens financial and operational sustainability by enabling shared infrastructure, shared expertise, and shared development. Systems that connect through open standards extend the lifespan of local investments, reduce duplication, and lower the technical and staffing burden on individual institutions.

Standards-based interoperability reduces reliance on proprietary integrations and mitigates risks associated with vendor consolidation. This approach preserves flexibility and choice, allowing PALCI members to plan strategically rather than reactively.

PALCI actively promotes standards-based interoperability through engagement with organizations such as [NISO](#) and the broader standards community, ensuring that member needs are represented and aligned with the wider information ecosystem.

3.2 Applied Innovation

Interoperability lowers barriers to participation in shared solutions. When systems exchange data reliably using shared standards, libraries can test new tools, workflows, and partnerships with reduced risk and minimal local customization.

PALCI prioritizes innovation that delivers tangible benefits to members. Interoperable infrastructure allows successful pilots and practices to be adapted and reused across institutions, making innovation a shared activity rather than an isolated local effort.

PALCI supports applied innovation through collaborative initiatives and working groups, including cross-consortial and cross-system efforts with partners such as the [Project ReShare Community](#), [CrossLink](#), the [Collaborative Collections Lifecycle Project \(CCLP\)](#), and other library consortia.

3.3 Trust and Community Infrastructure

Trust is central to effective consortial collaboration. Interoperable systems built on open standards and transparent practices reinforce trust by ensuring that data flows are predictable, documented, and governed collectively.

Open standards reduce uncertainty and align with PALCI's values of transparency, operational excellence, and mutual respect. This technical foundation supports strong professional relationships and enables more ambitious collaborative work.

Standards-based systems also future-proof local and consortial infrastructure, making it easier to integrate with campus services and adapt to emerging models.

3.4 Access, Affordability, and Impact

Interoperability enhances access and affordability by streamlining workflows, reducing duplication, and increasing the effectiveness of consortial programs. When systems communicate using shared standards rather than custom connectors or proprietary workarounds, libraries can focus resources on service delivery rather than system mediation.

Programs such as EZBorrow and ReShare demonstrate how interoperable infrastructure improves fulfillment speed, broadens access, and enables equitable participation across libraries using different ILS platforms.

Interoperable systems also allow PALCI to measure and communicate consortial value more effectively. Reliable data exchange supports assessment of resource sharing performance, coordinated collection strategies, and shared governance outcomes. These measures help PALCI document impact and communicate value to library leadership and campus stakeholders.

4. Open Standards and Proprietary Interfaces

Libraries depend on both open standards and proprietary APIs to deliver modern services. Understanding the distinction is critical for sound technology decisions.

Open standards are vendor-neutral, community-governed, and broadly implemented. They support interoperability, transparency, and long-term sustainability. Core examples within PALCI services include protocols for circulation messaging (NCIP), metadata harvesting (OAI-PMH), and catalog search (Z39.50).

Proprietary APIs are controlled by vendors and may involve licensing fees, usage restrictions, or unilateral changes. In an increasingly consolidated marketplace, heavy

reliance on proprietary interfaces can reduce institutional flexibility and increase long-term risk and cost.

PALCI recommends prioritizing systems built on open, vendor-neutral standards. Doing so preserves library agency, strengthens collaboration across institutions, and promotes a more competitive and sustainable technology ecosystem.

The protocols EZBorrow relies on are described in detail in Appendix A.2. Known ILS system adherence to those protocols is summarized in Appendix A.3.2.

5. Preparing for the Future

Interoperability will continue to evolve as libraries expand the scope of consortial collaboration, and PALCI is actively engaged in that evolution through work with [Project ReShare](#), [CrossLink](#), the [Collaborative Collections Lifecycle Project](#), and other vendor and publisher partners. Two developments deserve particular attention from member libraries planning future system investments: the rise of open metadata and the expansion of consortial sharing into ebooks and other digital content.

Open metadata practices allow libraries to use, reuse, adapt, aggregate, and share the metadata that describes their collections without restriction, as articulated in the [ICOLC Joint Statement on the Metadata Rights of Libraries](#). Institutions such as the [University of Pennsylvania](#) and [Stanford University](#) have adopted formal open metadata policies that affirm the library community's right to share descriptive data freely, typically through commitments to open licensing (such as CC0), accessible publication formats, and bulk download support. PALCI encourages members to adopt similar policies. Open metadata strengthens consortial discovery, enables shared infrastructure like the ReShare shared index to operate without licensing friction, and provides a durable foundation for future services that depend on metadata exchange across institutions and platforms.

Digital sharing is the second major area of expansion. As member libraries shift toward digital-first acquisitions, PALCI is developing capabilities to extend EZBorrow beyond physical materials to include whole ebook lending, chapter sharing, and other forms of digital content delivery. This work, guided by [PALCI's Digital Sharing Strategy](#), depends on the same standards-based, vendor-neutral infrastructure that supports EZBorrow today. Successful digital sharing will require ILS, discovery, and resource sharing systems that can represent digital entitlements in machine-readable metadata, communicate loanable status reliably, and support authenticated patron access across institutional boundaries.

Decisions made now about system selection and vendor relationships will determine how smoothly member libraries can participate in these emerging services. Systems that support open metadata policies, expose machine-readable entitlement data, and rely on

open protocols will be substantially better positioned to participate in ebook lending and other digital sharing initiatives without costly reinvestment or system replacement. Prioritizing open, well-governed interoperability is the most reliable way to preserve that flexibility.

6. Conclusion

Interoperability is foundational to sustainable, collaborative academic libraries. It enables PALCI members to share resources, extend local capabilities, and maintain control over their technology choices in a complex and evolving environment.

By prioritizing open standards, transparent integration, and shared governance, PALCI strengthens collective capacity and advances long-term collaboration among member libraries. The same foundation will support emerging services such as open metadata sharing and the expansion of EZBorrow into ebook lending and other forms of digital content delivery, ensuring that today's investments remain valuable as PALCI's collaborative work continues to grow.

PALCI staff have developed a companion document, available internally to PALCI members, that provides additional functional details and documentation, including detailed evaluation criteria, technical context, and vendor questions to support PALCI member libraries during system selection and procurement.