# Consortial Collaboration Framework for Resource Sharing

July 2026

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# CONSORTIAL COLLABORATION FRAMEWORK FOR RESOURCE SHARING

**July 2026**

## Introduction

In serving broad memberships with diverse operational and organizational needs, library consortia are well positioned to pursue collaborative approaches that expand access to information resources in cost-effective, scalable, and sustainable ways. While consortial resource sharing is designed to meet the majority of member request demand, the evolution of borrowing and lending patterns continue to reveal opportunities for greater coordination and efficiency across consortial networks.

An analysis of BLC's borrowing and lending activity from 2018-2022 highlighted the extent of this opportunity, showing that roughly 30–40% of member requests were being filled by libraries affiliated with other library consortia. Rather than treating this activity as incidental, the findings pointed to the potential to form more collaborative partnerships that could expand resource access and serve members more cost-effectively through coordinated action. In January 2026, resource sharing practitioners and central staff from two regional library consortia, the Boston Library Consortium (BLC) and the Partnership for Academic Library Collaboration and Innovation (PALCI) established a working group to address this opportunity and identify pathways for more intentional cross-consortial resource sharing.

The result of this partnership is the development of a Consortial Collaboration Framework for Resource Sharing, articulating the necessary infrastructures to foster better collaboration across library consortia and develop reciprocal resource sharing partnerships. Drawing on the experiences of both consortia through a Community Expectations Assessment Report, the framework offers a model for transforming informal or unintentional borrowing and lending activity into sustainable, scalable partnerships that improve fill rates, staff efficiencies, and the overall patron experience. This framework and the resources created throughout its development are intended to guide library consortia on the critical philosophical, policy, technical, and social dimensions that define effective and sustainable cross-consortial resource sharing practices .

Signed,

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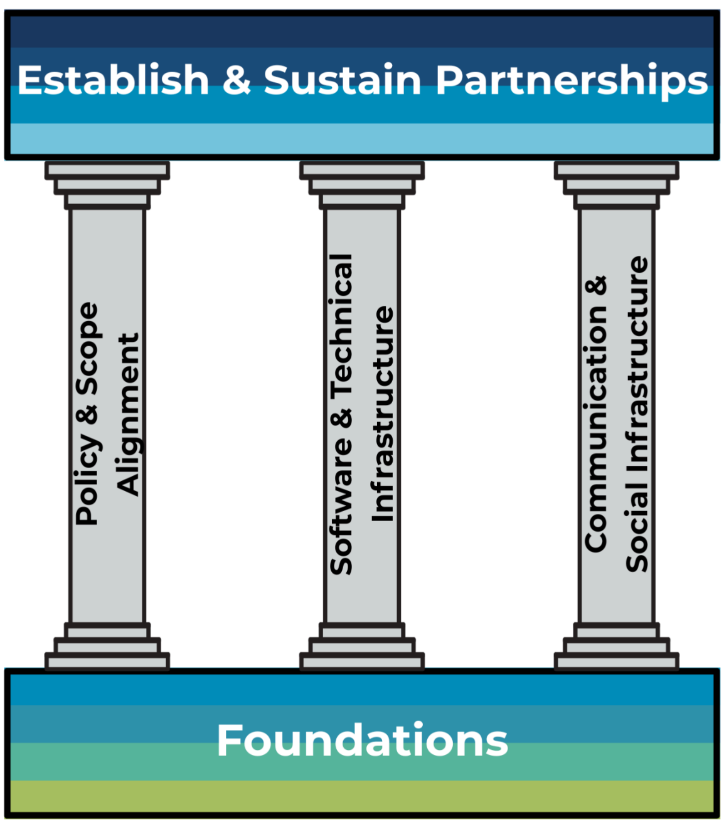
## Framework Structure

The Consortial Collaboration Framework for Resource Sharing is organized around five sections that, taken together, guide consortia from initial exploration through implementation and long-term sustainability:

- **Foundations:** clarifying motivations and assessing community needs before committing to a partnership.
- **Pillar 1: Policy & Scope Alignment:** identifying and harmonizing the borrowing and lending policies that govern consortial resource sharing.
- **Pillar 2: Software & Technical Infrastructure:** establishing interoperability between systems to support cross-consortial sharing.
- **Pillar 3: Communication & Social Infrastructure:** building the directories and channels through which partner libraries socialize and stay connected.
- **Establishing & Sustaining Partnerships:** implementing the partnership, governing it, and assessing its performance over time.

The framework is intended to be adaptable rather than prescriptive, and consortia should select the elements that best fit their membership, collective goals, and organizational contexts. Regardless of the final structure of any consortial collaboration, it is critical that each element of the partnership be periodically reviewed and maintained over time to ensure the partnership stays relevant and in alignment with the missions of participating consortia.



## Foundations

Consortia exploring partnerships should consider multiple factors before committing to a formal agreement. A solid foundation guides a consortium through the fundamental questions to ask when weighing a partnership, along with recommended ways of gathering the information needed to answer them.

### Step 1: Articulate the Why

The reasons for establishing cross-consortial partnerships may vary from one group to another, but they should be agreed upon before more extensive exploration begins. Identifying what each consortium expects to gain from a reciprocal relationship, and what challenges the partnership could solve, will help structure the process and provide a basis for evaluating how well the partnership is working once established.

Common motivations for entering reciprocal relationships may include:

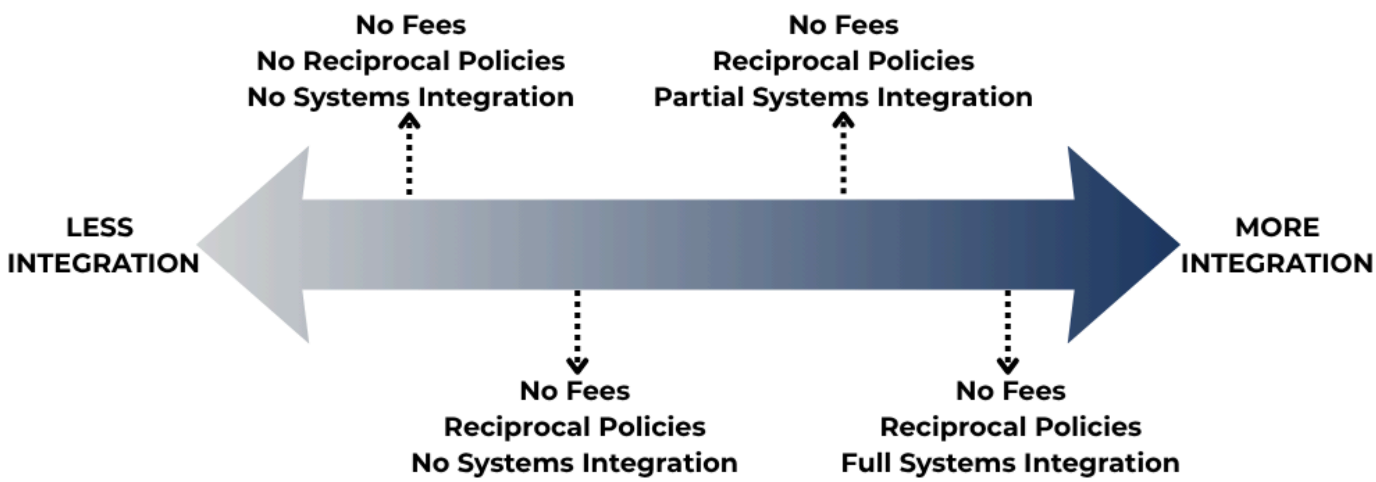
- **Philosophical:** a commitment to participating in broader communities of resource sharing, where expanding reciprocal agreements to include each other's members aligns with that goal.
- **Financial:** a desire to lower member libraries' borrowing fees by expanding the network of institutions from which they can borrow without charge.
- **Access to an independently-operated lending network:** as resource sharing platforms evolve within the tumultuous vendor landscape, costs for particular solutions and vendor commitment to provide continued support for said tools can shift unpredictably. Locally and independently-managed networks, such as those of consortia, offer an alternative solution for libraries facing budgetary challenges or limited autonomy.
- **Access to specific collections:** libraries in each consortium may hold specialized collections of interest to users in the other.
- **Workflow efficiencies and workload balancing:** where borrowing and lending processes are structured to streamline tasks, increased consortial borrowing may ease staff workload, and a larger pool of potential lenders can relieve pressure on any single interlibrary loan department during busy or short-staffed periods.
- **Decreased turnaround time:** consortia may leverage shipping agreements and geographic proximity to speed delivery of physical materials.
- **Formalization of existing relationships:** member libraries may already lend to one another at significant levels, and a formal agreement can strengthen this activity and open the door to further collaboration.
- **Strengthening institutional relationships:** as members of partnered consortia, individual libraries may find new opportunities to collaborate across institutions of individual library departments such as systems and licensing.

Identifying and clearly stating the reasons specific to a given situation is recommended. This need not be a binding final document, and reasons may be added or removed over time, but a shared understanding of what each consortium hopes to achieve helps focus planning on the outcomes that matter most.

Once a consortium can articulate the why, it becomes easier to evaluate the level of integration that will best serve those reasons and the consortium's members.

## Step 2: Level of Integration

Integrating consortial operations is not an all-or-nothing decision; a nuanced spectrum of collaborative options is available, ranging from no-fee informal arrangements to full systems integration. Considering the amount of effort each level requires alongside its anticipated benefits is helpful, since simply agreeing not to charge one another is a low-effort first step, while deeper integration calls for increasing commitment and work. The options below are arranged from less to more collaborative integration:




1. **No fees, no reciprocal policies, no systems integration**. Members agree not to charge one another, with no policy alignment or system interoperability.
2. **No fees, reciprocal policies, no systems integration**. Members agree not to charge one another and adopt one or more mutually applicable policies, such as turnaround time or loan length, but do not interoperate systems.
3. **No fees, reciprocal policies, partial systems integration**. Members agree not to charge one another, adopt shared policies, and interoperate some systems, such as a jointly adopted platform used for some consortial borrowing or lending, while other systems remain independent.
4. **No fees, reciprocal policies, full systems integration**. Members agree not to charge one another, adopt shared policies, and manage all consortial borrowing and lending within a single, interoperable system or configuration.

Each consortium should weigh which level is most appropriate for its members, taking into account the current systems in play, the effort required of consortial and member resource sharing staff, and any other relevant factors, then mutually agree on a level to work toward. Where varied member preferences or system requirements make higher levels of integration difficult, it can be practical to begin with the lowest level of commitment, agreeing simply not to charge each other's members, and to leave open the possibility of expanding the agreement in the future.

## Step 3: Community Expectations Assessment Report

Completing a Community Expectations Assessment Report (CEAR) helps a consortium understand the many factors that influence a partnership and consortia may choose to undertake all, some, or none of the following methods to assess the needs and expectations of their members. The CEAR developed by PALCI and BLC is included as a supplement to the framework starting on page 18.

### Documentation Review

This review involves gathering and reviewing existing documentation from each consortium to understand the approaches each takes on matters that may influence the partnership. Not every consortium will have written documentation on every issue, but whatever exists should be considered and reviewed. A thorough documentation review should identify and summarize:

- Mission,goal statements, and visioning documents.
- Policies, procedures, or best practices, whether consortially created or adopted from bodies such as ALA or IFLA.
- Technical requirements, such as scan quality.
- Pre-established shipping agreements, since some consortia have their own providers or discounted broker rates.
- Assessment of how well each consortium is meeting its own resource sharing goals.
- Demographics, including membership, geography, and service areas.
- Governance documentation.
- Other relevant documentation.

### Member Survey

Concurrent with or following the documentation review, a survey can provide more detailed and valuable information in the assessment of a cross-consortial partnership. Based on that experience, some additional data points may be worth collecting:

- Demographic information for individual libraries, such as the number of full-time-equivalent interlibrary loan staff or student workers.
- For smaller institutions where full-time-equivalent figures for interlibrary loan may be difficult to measure, consider asking how many staff are trained to handle interlibrary loan and how many hours per week they devote to it.
- Staff size and service hours per week (an important component of capacity).

### Focus Group Meetings

The documentation review and survey may provide enough information to move forward. Where more in-depth insight is needed, a series of focus group meetings can offer real-time perspectives from practitioners at participating member institutions. Based on that experience, several stakeholder groups are worth trying to include, though securing their participation may be difficult:

- Staff at small-staffed or less-resourced libraries and interlibrary loan departments, through targeted interviews that can surface challenges specific to these institutions.

- Systems representatives, whose input on the detailed system requirements of various libraries can be valuable.
- Associate or assistant directors and department heads who oversee resource sharing, as administrative buy-in is often required for consortial participation.
- Vendors or representatives of the systems under consideration, who can clarify what is technically feasible.

## Pillar 1: Policy & Scope Alignment

After completing this foundational work and assessment, participating consortia need to determine which policies should govern the partnership. Alignment of these policies sets shared expectations between all participating consortia, with the Community Expectations Assessment Report and agreed level of integration as cornerstones of this pillar.

The policy categories below are grouped into three tiers, arranged from basic to advanced levels of collaboration. These tiers are intended to roughly indicate how straightforward each area tends to be to align, with Tier 1 areas generally the easiest and Tier 3 areas typically requiring the most coordination and stakeholder input. Consortia should decide which tiers and policies are most relevant to their partnership and align or adapt these elements to meet their organization's needs.

| Tier 1: Basic Collaboration | Tier 2: Moderate Collaboration | Tier 3: Advanced Collaboration |
|---|---|---|
| Fees | Pull Slips/Book Bands | Special Collections |
| Formats | Processing Turnaround | Preferred Shipping Carriers |
| Loan Periods/Due Dates | Shipping Turnaround | Reciprocal Access to Physical Locations |
| Renewals | Quality Control/Requirements | |
| Recalls | Problem Resolution | |
| Replacements | | |
| Multi-Volume Handling | | |
| Communication | | |

### Tier 1: Basic Collaboration

#### Fees

Determine if cross-consortial members will charge one another lending fees. Consider whether members within a consortium currently charge one another, whether members already belong to agreements where they do not charge for lending, and, if fees apply, what an appropriate cost would be and how payment would be issued.

#### Formats

Decide whether the collaboration will include physical loans (returnables), digital lending (non-returnables), or both. Consider the money and time costs associated with each type of sharing, such as packaging materials and shipping for physical borrowing and lending, as well as the technological or licensing restrictions associated with digital lending.

Decide also whether there are restrictions on the types of materials that can be lent, particularly around the handling of physical items such as audiovisual materials, bound periodicals, or scores and whether such materials need shortened loan periods or higher replacement costs. For digital lending, determine whether the agreement will cover article scans, e-books, or digital surrogates of print resources (aka controlled digital lending).

### Loan Periods/Due Dates

Consider whether there will be a single set loan period for all materials, such as sixteen weeks, or whether due dates will vary by format type.

### Renewals

Determine if renewals are allowed, how members will request them, and whether there will be a standardized renewal period.

### Recalls

Consider procedures for recalls including whether recalls are permitted only in specific circumstances, such as when materials are needed for course reserves, and, if allowed, what the shortened loan period will be.

### Replacement for Lost or Damaged Items

Decide whether there will be a standardized policy for all members or whether each member institution will set its own. If a standardized policy is adopted, consider what replacements will be accepted in terms of format, edition, and year; whether there will be a flat fine; when a lending institution may send an invoice; and the expected turnaround time for a borrowing institution to pay for or replace an item.

### Multi-Volume Request Handling

Determine if institutions will loan multiple volumes per request or require separate requests per item, whether there is a limit on the number of volumes a lending partner will send, and whether a standardized procedure is needed for all members.

### Communication Structures and Expectations

Decide communication expectations between partners, including what channels or systems will be used to communicate and anticipated response turnaround times. Consider whether existing systems or applications can be adapted for the partnership, whether there is an expected turnaround time for answering questions from partners, and who the best points of contact are at the institutional and consortial levels.

## Tier 2: Moderate Collaboration

### Pull Slip & Book Band Expectations for Physical Items

Decide whether there will be a standardized template for pull slips, book bands, and other documentation. Consider whether one standard template will serve all book bands, what information they must contain, and whether a specific color is required. If there is no standardized band, consider what information must accompany items and how documentation should be sent, whether banded around items or placed inside them.

### Turnaround Time for Request Processing

Decide the standardized turnaround time for processing requests, including particulars such as the interval from when a request is submitted, printed, or sent to when it is shipped, and consider any exceptions for holidays, academic breaks, and other known closures.

### Shipping Turnaround Times

Decide the standardized turnaround time for shipping. Consider the expectation for how soon an item must ship after it is pulled, whether this is measured in calendar or business days, and how undelivered packages will be tracked and who is responsible for doing so.

### Quality Control/Requirements

For returnables, consider whether fragile or damaged items will be loaned and whether they will be marked for supervised or in-library use only. For non-returnables, consider the expectations for scan quality, including resolution, color mode, and document format.

### Problem Resolution

Decide how issues will be resolved when communication between partners fails. Consider the next mode of communication when a partner is non-responsive, who the best point of contact is within each consortium, and how and when member or consortia staff intervene to facilitate issue resolutions.

## Tier 3: Advanced Collaboration

### Special Collections Lending

Decide whether archival and special collections materials will be included. Consider whether these collections are usually available through resource sharing, which other stakeholders need to be involved, and whether materials will be designated as circulating, supervised use, or in-library use only. Also determine if scans from these collections will be facilitated through interlibrary loan or the purview of special collections departments and any requisite procedures.

### Preferred Shipping Carriers

Determine whether members or consortia must use a single preferred shipping carrier. Consider geographic factors in choosing carriers, whether any consortium already has an exclusive carrier agreement, and the cost implications of using the same carrier.

### Reciprocal Access to Physical Locations

Determine whether the collaboration covers only resource sharing or also includes reciprocal physical access to library spaces. Consider which institutions are already open to the public and which require an active affiliation such as student, faculty, staff, or alumni status; which other stakeholders are involved in providing access, such as security or ID production offices; and what other privileges physical access includes. Options may range from onsite reading privileges in all or a single building, the ability to check out materials onsite, the use of electronic resources onsite, or access to special collections.

Clear communication and written agreements are vital throughout the policy and scope alignment phase. A policy that seems obvious to one consortium may be uncommon or unspecified at another. When disagreements arise, working through them collaboratively and focusing on common ground is recommended. Policies established and aligned are never fixed; consortia may decrease or increase their collaboration level over time, and revisit which policy areas they have aligned on, based on member feedback.

## Pillar 2: Software & Technical Infrastructure

Full integration of software, including integrated library systems, resource sharing management systems, and any middleware, is not a requirement for consortial collaboration. What *is* required is interoperability between chosen systems, or at least a clearly established means of sharing resources. The steps below help a consortium determine how to support its desired level of integration through its software and technical infrastructures:

### Step 1: Software Identification

Identify the platforms each consortium's members currently use, and determine whether any specific systems requirements are essential to successful collaboration.

### Step 2: Consortial Grouping

Within each system, determine how consortial partners are identified for the purpose of prioritizing request processing and recognizing no-charge arrangements.

### Step 3: Evaluation of Existing Software Solutions

It is important to evaluate any resource sharing systems already in use among consortial libraries. Some systems, such as RapidILL or RapidR, may offer pre-existing workflows that can be built upon, which can build member confidence through reduced implementation complexity and minimized training.

### Step 4: Aligning Systems with the Desired Level of Collaboration

Based on the systems in use and the agreed level of collaboration, determine:

- How members will identify no-fee/charging arrangements.
- How they will represent reciprocal lending policies within their current systems.
- How the consortia might use existing connections between systems to facilitate cross-consortial arrangements.

Consider whether an alternative system could better support these arrangements. Once platforms are identified, confirm that they are interoperable or determine what implementation work is needed for them to more fully interoperate.

### Step 5: Formulating an Integration Plan

Articulate an integration plan that establishes the systems connections needed to support cross-consortial sharing. Rather than committing to specific vendor products, the framework recommends prioritizing platforms that use open standards, such as ISO 18626, which allow for greater system interoperability. Consortia should also consider what level of troubleshooting support is available from vendors, consortial staff, and member institutions, recognizing that smaller institutions may have limited or no local systems support.

## Pillar 3: Communication & Social Infrastructure

Communication between libraries in a partnership is paramount to the success of cross-consortial partnerships. When considering a collaboration, the consortia involved must develop the infrastructure through which participating libraries communicate with each other. This infrastructure empowers institutions to know whom to contact at each partner organization and can readily provide the contact and address information needed to sustain the partnership. There are three main steps to developing this infrastructure: collecting relevant information, creating the directory, and maintaining the directory.

### Step 1: Collecting Relevant Information

Contact information for both consortial staff and individual institutions must be collected to support the partnership. At individual institutions, this ideally includes:

- Interlibrary loan supervisors/managers.
- Primary contacts for both borrowing and lending.
- Individuals responsible for systems configuration, updating holdings, and any other relevant systems work.

Additional useful institutional information includes:

- General interlibrary loan departmental email addresses.
- Departmental phone numbers.
- Office hours for interlibrary loan operations.
- Mailing addresses for both postal and courier delivery where they differ.
- Addresses for branch libraries.
- ISO, OCLC, and ISIL symbols.
- Methods through which a library can accept digital files, including non-PDF materials.
- Courier symbols, where partner consortia share a regional courier system or connecting courier systems.

### Step 2: Creating the Directory

Consortia should select a platform to host the directory depending on what both organizations may already use. Leveraging existing infrastructure is recommended where similar platforms are in place. Where there is no shared infrastructure, options include Confluence, Basecamp, consortial websites, or a Google Form with an attached Google Sheet for output. One example of the latter is the International ILL Toolkit, in which staff submit updated contact and address information through a form that feeds a shared sheet. The directory can also live within a file management platform alongside other shared documentation and agreements.

### Step 3: Maintaining the Directory

A directory is only as good as the information it contains. Establish a regular review cadence to keep information accurate and current, and designate one or two points of contact responsible for major reviews and updates as well as the directory's overall structure. Where possible, these individuals should keep a history of reviews and changes if the hosting software does not do so automatically.

### Informal Communication

Keeping the directory and formal communication usable also means keeping them uncluttered. A cross-consortial catch-all communication channel for day-to-day problems, solutions, notifications, and temporary announcements is recommended to allow for socialization amongst participating practitioners at consortial member institutions. This can be as simple as an email forum that any member can access, see, and use. Options such as Basecamp, which supports both in-platform and email conversations, or built-in messaging features in interlibrary loan systems such as ReShare can serve this purpose.

### Joint Meetings

Where availability and schedules allow, periodic meetings between consortia members offer the opportunity for deeper connection and collaboration in the sustenance of a cross-consortial partnership. For example, the members of the Consortial Collaboration Working Group found great benefit in the chance to meet and learn from each other in the collaborative development of this framework and would strongly encourage opportunities for staff to engage and further socially interoperate.

## Establishing & Sustaining Partnerships

There are several approaches to implementing and maintaining a cross-consortial resource sharing partnership based on timelines, size, structure, organizational readiness, and buy-in. Consortia interested in establishing a partnership should consider the following:

### Formally Establishing a Partnership

The parameters of a cross-consortial resource sharing partnership will heavily depend on a number of inter-organizational and institutional constraints. Consortia may functionally operate as non-profit 501(c)(3) organizations, be supported through state/national agencies and funding allotments, or may be administratively based at one or more member institutions that participate in the consortia. Given these various organizational contexts, interested consortia should consider a number of factors to establish a partnership:

- **Financial implications**, including shipping, staffing, supplies such as book straps, and implementation and maintenance fees for software.
- **Vehicle for formalizing the partnership**, whether that be a contract or memorandum of understanding approved by an executive director or governing body such as a board of directors.
- **Governance pipeline and process**, depending on the type of organization this may require a proposal from requisite institutions or communities, approval from a board of directors, or signoff from a governmental agency.
- **Formal announcement of the partnership**, including timelines and alignment of communication channels and/or press releases.

## Models for Implementation

Partnering consortia should determine early what model of implementation should be used to fully test and/or execute the consortial partnership. These models may include:

### Pilot Group

A limited number of member libraries from each consortium participate for a predefined period. Pilot libraries test workflows, policies, and technical integrations to surface any issues, and staff may develop best practices documentation from their shared experience. When the pilot concludes, these staff can act as liaisons who help guide a larger implementation. The advantages include lower initial risk, easier troubleshooting, and a stronger opportunity for iterative improvement. The chief challenge is that a small pool of libraries yields a smaller data set that may not represent all member needs, so a full implementation could still produce unexpected errors.

### Phased or Tiered Implementation

Full commitment already exists, and participation and implementation is staggered over time. The approach offers many options for phasing depending on each consortium's context and local institutional restraints. Its advantages include reduced consortial staff workload when only a few libraries implement at a time, less broad organizational disruption, and space for more targeted training and support. The disadvantages include a longer overall timeline and possible frustration among members at the slower pace, since the full benefit may not be evident until all libraries have implemented the arrangement.

### All-at-Once Implementation

All member libraries implement and participate in the partnership at the same go-live date and collectively adopt any collaboratively developed shared policies and best practices. Its advantages include less overall time spent onboarding institutions through a tiered approach and more immediate access to the broadened pool of resources shared through a cross-consortial partnership. Its disadvantages include the complexity of navigating the needs of multiple institutions and the time commitment of onboarding all members at the same go-live date, depending on the size of each participating consortium.

### Opt-In Participation

This approach can be combined with any of the others, producing an opt-in pilot, an opt-in phased rollout, or an opt-in all-at-once implementation. It suits consortia where not all member libraries have committed but a majority are interested. The advantages include acknowledging varying levels of institutional readiness and allowing highly interested institutions to participate even when others do not. The drawbacks are that participation rates may vary enough to reduce the overall benefit and that imbalanced service expectations may arise among member libraries.

### Roadmaps

A detailed project roadmap is recommended to set expectations for member libraries, including projected milestones and target dates that maintain momentum and mutual accountability. It should be detailed enough to set clear expectations yet flexible enough to accommodate unexpected changes such as staff turnover or unexpected technical delays.

## Sustaining the Partnership

After the official launch of the partnership, consortia must consider how they will maintain the policies, best practices, and workflows established between the two groups over time. There are several potential models available to help guide and sustain cross-consortial partnerships:

### Oversight and Governance

Participating consortia should establish a formal oversight structure to monitor the collaboration's operations and ensure continued alignment with its goals. This structure also helps determine whether the goals remain sustainable and worthwhile or whether adjustments are needed. Several governance models are possible; two common ones are described below:

- **Staff-Only Administrative Oversight**
    - In this model, consortial staff manage implementation, operations, troubleshooting, and ongoing sustainability, while practitioners and library-specific stakeholders take a largely hands-off role aside from submitting help inquiries. This can foster quick, efficient decision-making with clear operational authority, but it may limit broad member input and create over-reliance on a small number of consortial staff.
- **Collaborative Steering Committee:**
    - A steering committee can take many forms. One example sets a term limit of two to three years for a committee composed of representatives from consortial member libraries, such as three representatives from each consortium plus one consortial staff member, for a total of eight members. Responsibilities might include monitoring partnership performance, collecting and reviewing assessment data, addressing

policy concerns, coordinating communication, and recommending improvements. This model fosters shared governance, transparency, and stronger member engagement, but it may slow decision-making and requires ongoing coordination among busy staff.

### Oversight Practices

Formal meetings among consortial staff may be held on a regular rotating basis to identify operational concerns, discuss emerging issues, and review assessment data. Depending on the governance model, the governing body should also solicit feedback from participating libraries at predetermined intervals to assess both the short-term and long-term viability of the project. Feedback can be gathered informally, such as a call for input sent to consortial listservs, or formally, such as a survey directed at specific topics of concern.

## Collecting Borrowing and Lending Statistics

A consistent, partnership-wide view of activity that relies as much as possible on data institutions already collect locally will better position partnerships to guide decision-making and track progress in their partnership. Because most consortia have established reporting practices, the framework prioritizes aligning existing data, identifying common data points, and adding new points only when necessary. In general, consortia should:

- Use existing system reports, such as those from ILLiad, Rapido, or Tipasa.
- Identify and align common data points.
- Agree on shared definitions for any statistics collected.

At a minimum, each consortium should provide:

- The total number of borrowing requests submitted.
- The total number of lending requests received.
- The number of requests filled.
- The number of requests unfilled or canceled.
- The format (physical or digital).
- The average turnaround time.

Rather than creating new workflows, a shared reporting survey can be distributed on a regular basis, such as annually, to collect and aggregate this data, which may then feed a dashboard, reporting site, or shared spreadsheet for a more comprehensive review. Where additional data is needed, consortia can add a small number of targeted questions, such as whether a request was routed to or filled by a partner consortium, or the fill rate specific to cross-consortial requests.

## Overall Assessment Plan

A shared report should be compiled on a regular basis, bringing together data from all participating consortia. Responsibility for compiling it may rest with a steering committee, a lead consortium, consortial staff, or a governing body. The combined report should summarize key metrics such as borrowing and lending activity, turnaround time, and fill rates; highlight member feedback and success stories;

discuss staff time and financial cost savings; identify common issues and support discussion of improvements; and outline future direction and next steps.

A key consideration for long-term success is keeping assessment and reporting sustainable. Wherever possible, assessment should be embedded in existing workflows, relying on system-generated reports and data already collected to reduce staff time burdens. Additional data collection should be added intentionally and supplemented as needed through periodic surveys or sampling of members. Open channels of communication support informal feedback and ongoing evaluation of the partnership. As systems and workflows evolve and the partnership matures, data collection practices should be revisited and refined to meet emergent needs. Balancing consistency with adaptability helps ensure that any assessment activities remain both useful and sustainable over time.

## Conclusion

Cross-consortial resource sharing is ultimately centered on expanding access through intentional collaboration, building networks that are stronger and more resilient than any one organization can create alone. While every consortium operates within its own unique contextual parameters, the experiences reflected in this framework demonstrate that meaningful partnerships can be developed through collectively shared goals and a willingness to align consortially developed policies and best practices. This framework is intended to serve not as a final blueprint, but as a starting point for libraries and consortia to build meaningful partnerships that strengthen their resource sharing services through cost-effective, scalable, and sustainable access to information resources.

# COMMUNITY EXPECTATIONS ASSESSMENT REPORT

## Introduction

The Community Expectations Assessment Report (CEAR) is a product of the Consortial Collaboration Working Group, composed of 12 members of the Boston Library Consortium (BLC) and the Partnership for Academic Library Collaboration & Innovation (PALCI). Developed from the experiences of both consortia, this report establishes a shared understanding of the policies, practices, and technical requirements that shape cross-consortial resource sharing by surfacing practitioner-centered expectations and perceived barriers to effective collaboration.

The goal of this document is to inform a scalable framework for cross-consortial resource sharing partnerships beyond these initial consortia. The CEAR's primary audiences include resource sharing practitioners, systems staff, and consortial staff amongst BLC and PALCI. While insights from leadership provide valuable context, this report does not address governance implications, instead centering the experiences of professionals working in frontline resource sharing services. The CEAR provides a clear, practitioner-informed foundation for future planning, pilot projects, and policy alignment efforts related to cross-consortial resource sharing that remains adaptable beyond our two consortia.

After an overview of the report's methodology, the CEAR is divided into five sections focused on core elements for establishing reciprocal resource sharing relationships and integrating activities amongst consortia:

- Consortial Context and Social Infrastructure
- Policy Expectations
- Workflows and Practitioner Experience
- Barriers and Gaps
- Technical and Functional Requirements for Effective Cross-Consortial Collaboration

## Methodology

To develop the CEAR, the Consortial Collaboration Working Group gathered comprehensive data via three methods:

- **A documentation review** that included formal consortial policies and best practices, internal consortial support for resource sharing operations, and consortial planning and visioning statements.

- **A survey** focused on departmental involvement in resource sharing, workflow practices, and platforms used.
- **Focus groups** centered on both practitioner experiences and systems/technological integrations.

### Documentation Review

The documentation review involved examining the following consortial policies and internal documents:

- **BLC:** Resource Sharing Policies & Best Practices, Consortial Shipping Policies & Documentation, BLC Members Local ILL Policies & Services (internal), BLC Resource Sharing Site Visit Report (internal)
- **PALCI:** EZBorrow Policies, EZB Request Messaging Best Practices, EZBorrow Shipping Best Practices, EZBorrow Systems & Links spreadsheet (internal), PALCI Digital Sharing Strategy

### Survey

A survey was emailed to both consortial listservs on March 4, 2026 with 8 days allowed for responses. The survey received 98 responses, including 32 respondents from 21 out of 25 BLC member libraries (an 84% institutional response rate) and 66 respondents from 58 out of 81 PALCI member libraries (a 73% institutional response rate). This survey gathered data on where resource sharing fit within the ecosystem of each library and whether current consortial workflows differed from other resource sharing workflows.

### Focus Groups

Four focus groups were conducted via Zoom on April 6 and 7, 2026 with working group members serving in facilitation and notetaking roles. Two sessions were focused on exploring practitioner experiences in resource sharing and two centered on systems and technology-related integrations to support interlibrary loan workflows. The total attendance for the focus groups (including working group members) was 45 for the practitioner experience sessions and 38 for the systems-focused sessions, with some individuals attending both sessions.

## Consortial Context & Social Infrastructure

### Overview

BLC empowers a coalition of libraries across the northeastern United States, with a mission focused on sharing knowledge, infrastructure, and resources at scale. This network includes public and private universities, liberal arts colleges, state libraries, public libraries, and special libraries united by a commitment to champion innovation through collaboration. Strategic priorities include resource sharing, licensing and content, professional development, and shared systems and services. BLC's primary resource sharing software is RapidILL/RapidR, though consortial agreements extend to requests submitted through other software. Beyond consortial resource sharing systems, ILLiad is the primary request management software used by most BLC member institutions, with others using Tipasa, WorldShare ILL, or Rapido.

PALCI serves academic and research libraries in Pennsylvania and surrounding states, with a mission centered on cost-effective, sustainable access to information resources. Its strategic priorities emphasize collaborative infrastructure, scalable innovation, and shared stewardship. Resource sharing is powered by EZBorrow (built on ReShare) for physical/returnable materials, with supported integrations for ILLiad and Rapido, as well as negotiated agreements for Rapido, RapidILL and RapidR.

## Roles & Support Structures

Both consortia rely on a similar three-tier structure:

- **Resource sharing practitioners** who manage day-to-day workflows & operations
- **Systems staff** who handle integrations and troubleshooting
- **Consortial support teams** who provide training, facilitate community engagement, and coordinate with vendors

PALCI's consortial support extends to active participation in Project ReShare governance, shaping the software platform at a community level. BLC's consortial support includes liaising with Ex Libris and coordinating professional development through dedicated staff.

## Communication & Mediation

BLC communicates with its resource sharing community through an ILL practitioner email group and is supplemented by Google Drive for file sharing. Request-specific communication is encouraged within existing ILL systems where possible, using standardized "Reasons for No" to support clear workflows. When system differences make in-system communication impractical, direct email contact between libraries is permitted.

PALCI uses Basecamp as its primary consortium-wide communication platform, supplemented by Google Drive for file sharing. Request-specific communication occurs within ReShare's built-in messaging feature, which ties correspondence directly to individual requests. Libraries are expected to check messages at least twice weekly, with daily monitoring preferred. Messages left unanswered after 48 hours may be escalated to email.

Both consortia maintain structured mediation policies to address disputes amongst their memberships, starting with direct communication between member libraries and escalating to consortial support staff when needed. In both cases, unresolved issues may lead to formal intervention or temporary suspension of resource sharing privileges, with hardship-based provisions included to allow for flexibility when institutions proactively communicate any local constraints.

### Address Management & Directory Information

PALCI maintains an EZBorrow wiki updated by member libraries, containing shipping addresses, primary contacts, OCLC symbols, IDS of PA shipping numbers, ILS software, catalog links, and reciprocal ILL status. Most libraries follow a template to standardize information. BLC does not maintain a centralized directory with address information. Address and policy data are drawn from the OCLC policies directory and updated locally within systems like ILLiad or RapidILL. The BLC provides a spreadsheet that documents institutional ILL policies and services, but does not function as a true address directory.

## Policy Expectations

### Policy Similarities & Differences

Both consortia share a standard 16-week loan period for physical materials and limit recalls only to materials needed for course reserves. The requesting library bears responsibility for materials from the time of shipment through return. Both consortia support multi-volume requests, though due to system limitations these require staff intervention and communication to clarify specific volumes needed. Both place responsibility for damaged materials on the requesting library, though BLC additionally encourages passing requests for poor-condition items to the next lender.

Policies between the two consortia diverge around topics of format fulfillment, renewals, and invoicing. PALCI's EZBorrow service lends physical items only, with RapidILL only used by a subset of members for digital requests. BLC supports both physical and digital fulfillment, the latter of which has detailed digitization standards (300 dpi minimum, OCR required, title page and verso included for books) and a broad scope of lendable resources (articles, e-books and digital surrogates where permissible, etc.). In addition, PALCI does not permit renewals, whereas BLC defers to local institutional renewal decisions in lieu of a consortially agreed upon policy. For invoicing, PALCI requires invoices to be issued no sooner than 24 weeks post-checkout and no later than one year whereas BLC encourages resolution within 90 days after the due date.

## Shipping Practices

Both consortia require expedited shipping policies, but differ in terms of exact timeframes for processing and shipment. PALCI expects items to be filled or responded to within 48 hours (24 preferred), shipped within 24-48 hours of being marked "Shipped" in ReShare, with a total turnaround not exceeding 72 hours. IDS (Interlibrary Delivery Service of PA) is the preferred carrier, though individual institutions may choose their own.

BLC expects a response and shipment within one business day. UPS CampusShip and 2nd Day Air are the standard carrier and service level, respectively. To reduce overall shipping packages and operational costs, BLC utilizes the Massachusetts Library System's statewide courier service for returns within MA and RI. BLC also supports a Partner Shipping Initiative, which encourages libraries in CT, NH, and VT to bundle returns destined for MA and RI institutions. Both consortia support misdelivered item forwarding, with BLC additionally requiring notification to both the borrowing and lending libraries.

## Aligning Local Practices with Consortial Standards

Focus group participants from both consortia generally reported reasonable alignment with consortial expectations, with most describing their workflows as functioning well within existing staffing constraints. Several noted having made deliberate adjustments to better align with consortial standards: extending lending loan periods, optimizing shipping workflows to meet EZBorrow turnaround time expectations, and adopting 16-week loan periods as a standard regardless of system origin. However, participants noted that they treat overdue items as lost slightly later than best practices recommend, reasoning that most items eventually return and the invoicing overhead is not justified by the small number of issues. The availability of clear policy documentation was cited as helpful for shaping local practices, particularly for institutions whose ILL departments use consortial guidelines as a baseline for their own internal procedures.

# Workflows & Practitioner Experience

## Workflow & Student Worker Management

Practitioners across both consortia value the collaborative nature of resource sharing, including the ability to connect researchers with hard-to-find materials, build professional relationships, and contribute to the broader scholarly ecosystem. When asked whether their workflows differed for consortial requests, numbers were split roughly equally. Where differences existed, they included prioritizing consortial requests, different shipping processes or loan periods for consortial requests, and different platforms used to handle these requests.

Resource sharing processes and workflows are handled in various configurations with responsibilities handled by single departments or divided among multiple units. These duties include handling physical loans, digital requests, circulation, and remote storage, each with its own dedicated staff and workflows. Distributed operations can present structural challenges to supporting resource sharing workflows and lead to issues with internal communication, coordination amongst various stakeholders, and occasional confusion for patrons.

Student worker management is another ongoing communication layer: paper notes, canned emails, and tiered task assignments are common workarounds for the fact that complex system behaviors cannot be fully communicated to student staff in real time. Budget constraints and position reductions drive dependency on these part-time, temporary workers, which brings inconsistent availability and limits to what workers can reasonably be trained to do, creating a fragile operational baseline. Any expansion of cross-consortial activity must account for this reality.

## Software Use & Configurations

Commonly cited ILL systems used include ReShare (PALCI), ILLiad (valued for customizability, ISO connections, and copyright tracking), Rapid (valued for ease of use and load balancing), Rapido (valued for unmediated requests and Alma integration), and Tipasa (valued for its simple interface). Participants described a wide variety of system combinations in daily use, reflecting the diversity of institutional setups. Common software stack configurations included ILLiad with RapidILL and IDS Logic; Rapido with Alma; ReShare with various ILS platforms; and combinations involving OCLC WorldShare ILL, Docline, and AccessPA (Autographics SHAREit). Several libraries run three or more major systems simultaneously for different request types. These arrangements are developed by necessity rather than choice, with the need to switch between systems at different places throughout the borrowing and lending process a common pain point.

## Automation

Automation is widely valued, with unmediated requests regarded as the best; any request that successfully reaches its destination without staff involvement is deemed a success. However, practitioners value systems that allow them to dive deeper when needed and expressed wariness about automation that removes visibility into why a request was or was not filled. Good automation should handle the routine cases reliably while preserving staff ability to intervene on exceptions, such as the edge-cases that multiple participants observed their primary systems struggle to handle: multi-volume requests, difficult-to-obtain materials, foreign language requests, and items lacking appropriate metadata. These necessitate manual intervention, email requests, or access to external systems, and automation that limits notifications or ability to intervene will not serve users.

## Barriers & Gaps

From the working group's data collection, a number of operational, technical, and policy-related factors emerged as challenges to full participation in consortial and cross-consortial resource sharing efforts. These barriers and gaps generally fall into four categories:

- Operational Capacity & Structural Constraints
- Systems & Technological Interoperability
- Digital Fulfillment & Delivery
- Additional Challenges to Cross-Consortial Resource Sharing

### Operational Capacity & Structural Constraints

Staffing capacity was identified as the greatest concern when considering participation in cross-consortial resource sharing. Many libraries operate with very small teams and the cognitive and operational load of learning multiple systems may discourage engagement in cross-consortial partnerships. Dependency on student workers is also common and often determines the ability to meet turnaround expectations, as their availability fluctuates based on time of day, day of week, and season. Notably, the start of the academic term is when demand is often highest and student workers are newest and least trained. For thinly staffed libraries, a single missed shift, vacation day, or sick leave can compound into a request backlog across multiple systems. The feasibility of expanding consortial sharing for these institutions will depend on it imposing minimal changes to existing workflows.

Compounded by challenging staffing situations, additional structural barriers such as budget limitations or organizational dependencies make the implementation and ongoing management of additional systems a significant challenge, particularly for smaller institutions. The complexity of ILL systems sets a limit on how much can be delegated to non-specialists. Departmental dependencies beyond ILL staff, such as mailroom operations, offsite facilities, and IT support, further affect service fulfillment but remain outside of library staff's control. To mitigate these challenges, informal buffers may be built into workflows to address these intricacies such as accepting longer official turnaround times as a cushion for challenging staffing days, extending loan periods to reduce renewal requests, and directing patrons to purchase suggestion forms.

Adaptive strategies to address staffing limitations included prioritizing short-turnaround requests first, temporarily disabling systems or turning off lending when overwhelmed, cancelling requests with a ‘staffing’ reason to keep them moving, and cross-training public services desk staff in ILL tasks. Participants overall relied on "doing their best" within existing constraints, applying modest adaptations in the absence of systemic solutions.

Shipping costs and logistics were a close second to staffing as a structural constraint, as increased package volume from cross-consortial sharing translates directly into higher costs and exposes variability in carrier reliability; multiple participants described persistent difficulties with carriers failing to pick up packages. Physical infrastructure also plays a role, as some institutions lack the printer setup or supplies needed to comply with requirements like color-coded book bands, creating additional barriers to participation in certain workflows.

## System & Technical Interoperability

Incompatibility between systems was consistently named as one of the largest barriers to efficient resource sharing. Silent failures, or requests that fail to update between platforms but do not send an error message or notification, are especially frustrating as unnoticed errors that result in significant backlogs and delays. Practitioners noted failed status updates across platforms and automatic overdue emails being routed to spam as persistent issues. Other technical barriers include incomplete integrations between Rapido and ReShare (expected to be resolved with CrossLink integrations in Summer 2026), limited or delayed ISO standard adoption across all library systems, and flawed or nonexistent vendor API documentation or maintenance.

System communication failures were reported to result in additional work and time for almost all aspects of resource sharing, from filling requests to troubleshooting unfilled or complicated requests, to staff and student worker training. With no reliable way to communicate about specific requests across different ILL systems, email serves as a less ideal fallback as contact information may be outdated, incomplete, or routed to a general email rather than an ILL office.

Externally, vendor support to address recurring issues varies in terms of quality. Focus group participants flagged communication with vendors as a recurring issue, with response times from some vendors highly inconsistent and support tickets sometimes going unacknowledged for weeks. Delays in addressing these issues further exacerbate local challenges and increase reliance on piecemeal solutions that further increase staff’s dwindling workload capacity.

Manual workarounds are the norm rather than the exception, with staff regularly cutting and pasting requests between systems, maintaining duplicate records, manually updating parallel platforms, and creating custom addons to compensate for missing functionality. These workarounds are time-consuming, error-prone, and difficult to document or train others on. A number of specific system updates were named as desirable, all of which come down to improvements in the way that requests move and update between systems.

### Digital Fulfillment & Delivery

E-book and digital content handling was the most widely cited vendor-related barrier. Participants described a fundamental mismatch between how systems understand and route digital requests and the broader nature of digital collections. Systems regularly route physical book requests to libraries that only hold the e-book, and often cannot parse nuanced licensing details for e-book collections. Publisher restrictions on e-book lending and controlled digital lending present an additional layer of constraint with little vendor responsiveness.

File and supplemental material delivery was cited as another recurring frustration. ILLiad accepts only a single PDF per request, so supplemental data such as spreadsheets, presentations, and large datasets must be sent separately via email. This adds manual steps that students or other part-time ILL staff must reliably execute, while file types that cannot be reasonably converted to PDF present no good solution within current systems. File size management for both digitized articles and supplements is an emerging area needing clearer standards: OCR processing, resolution requirements, and file size limits interact in ways that are not consistently documented across systems, and what counts as "too large" to send appears to vary.

### Additional Challenges to Cross-Consortial Resource Sharing

Participants also identified a range of additional, more diffuse barriers that collectively hinder effective cross-consortial resource sharing. These include concerns that expanding beyond existing consortia may erode valued features such as predictable loan periods and geographic efficiency when policies and turnaround expectations are not aligned. Differences in institutional e-resource licenses or manual processing requirements, such as PALCI's pale blue bookbands for EZBorrow items, which some libraries lack the resources to produce, further complicate full participation in consortial practices.

At the operational level, inconsistencies in system data and record quality introduce additional friction, including duplicate EZBorrow records requiring manual sorting, incomplete identifiers that lead to shipping errors, and lagging OCLC status updates that create confusion for borrowers. International borrowing remains a persistent gap, with no robust system-level solution for libraries outside OCLC, while inconsistent terminology across platforms adds to staff training challenges.

Additional commonly cited pain points include inconsistent or incomplete patron-submitted citations, challenges in borrowing and lending e-books, the need to navigate varied invoicing and payment practices across partner libraries, and difficulty advocating for ILL services within institutions. Though these latter points are less consequential for establishing reciprocal sharing partnerships, they do highlight further opportunities for collaboration amongst consortia to scale their impact in the library and information ecosystem.

## Technical & Functional Requirements for Effective Cross-Consortial Resource Sharing

From BLC and PALCI's practitioner-guided insights, three key themes emerge as critical technical and functional requirements to support effective cross-consortial resource sharing:

- Policy Alignment
- Leveraging Existing Systems and Integrations
- Shared Directory and Communication Infrastructure

### Policy Alignment

Policy alignment is a prerequisite, not a byproduct, of cross-consortial sharing. Participants were clear that loan periods, terms of use, and turnaround expectations need to be harmonized before expanding consortial workflows, not worked out afterward. Inconsistent policies create downstream technical problems and frustrated expectations on both sides of a transaction. Harmonized terms of use and loan periods were described as foundational. Participants want clear, minimal, and consistent expectations: "you will provide this request by this time" rather than complex mid-process communication requirements.

### Leveraging Existing Systems & Integrations

Both BLC and PALCI prioritize flexibility and vendor-neutral standards in their systems approaches, with PALCI emphasizing standards-based, library-owned infrastructure grounded in robust metadata practices, and BLC highlighting customizable request routing, ease of discovery, and cost as key factors in evaluating new integrations. However, these consortial goals operate within a fundamentally decentralized ecosystem in which individual libraries retain significant autonomy over local system choices. As a result, member institutions utilize a number of ILSs (Alma, FOLIO, Koha, Sierra, Symphony, WMS, and others) and ILL platforms (ILLiad, Rapid, Rapido, ReShare, Tipasa, Clio, WorldShare ILL, and others). This diversity complicates interoperability, as not all systems support ISO standards or rely on proprietary vendor APIs that limit choice and integrations.

Both consortia acknowledge that any future cross-consortial system must operate as a third platform capable of bridging existing consortial software solutions (Rapid for BLC and ReShare for PALCI) with flexibility to accommodate the wide variety of ILSs and ILL systems currently in use across member libraries. Although system variation complicates sharing, it need not prevent it, as long as integrations exist and policies are consistent. Focus group participants were not interested in adding another platform to their workflows, or having to learn and train staff on another system. Too many ILL staff are already switching between systems in their daily workflow; adding another would create a barrier.

Automation serves as a key tool to address these complications, as participants desire systems that handle more of the routing, updating, and communication tasks without requiring staff to manually touch requests across multiple platforms. Participants also stressed the importance of load-leveling, which would distribute volume equitably and prevent smaller institutions from being overwhelmed. Any cross-consortial system should ideally be able to handle e-book requests, as many participants expressed difficulty with the way e-book requests are currently handled and e-books are an increasing percentage of library collections.

## Shared Directory & Communication Infrastructure

Any cross-consortial partnership will also require a directory of contact information. Currently, BLC and PALCI use two very different methods for hosting membership contact information, neither of which is integrated into member libraries' primary ILL system. Focus group participants stated that keeping shipping addresses and contact information up to date across multiple systems is a recurring manual burden with no effective automated solution. Outdated contact data and unresponsive partner libraries compound the problem. Participants want direct ILL department contact information to be easily accessible within the systems they already use. Ideally clear shipping information, including branch identifiers, would also be able to be printed on pull slips and book bands to reduce shipping errors.

Regardless of whether the cross-consortial partnerships' chosen system can sync directory data automatically or whether libraries must manually transfer updates into their own platforms, any shared directory must be actively maintained and kept current. If the directory is not automatically updated within ILL systems, libraries must be informed of any updates so they can make changes within their primary systems. Focus group participants also requested shared documentation and a common problems repository: a living resource where practitioners can record edge cases, known workarounds, and system-specific quirks that others can reference rather than rediscovering independently.

## Conclusion

The Community Expectations Assessment Report conveys a clear and consistent message from practitioners across both consortia: cross-consortial resource sharing is achievable, but only if the groundwork is deliberately laid. The barriers identified in this report are not insurmountable, but are inherently interconnected. Staffing constraints shape what automation is necessary. System incompatibilities determine what policy alignments are even possible. And the absence of a shared directory compounds every other coordination challenge.

Three priorities emerged from the data as foundational to any cross-consortial framework. Policy alignment must come first, establishing harmonized loan periods, turnaround expectations, and terms of use before workflows are expanded. Any shared infrastructure must work within and alongside existing systems rather than adding to the stack practitioners already navigate daily. And a maintained, accessible directory of contact and shipping information is a prerequisite for the kind of reliable, low-friction communication that cross-consortial sharing requires.

What practitioners asked for, above all, was predictability. Clear expectations, systems that behave consistently, and communication channels that do not require workarounds. The CEAR's findings suggest that a cross-consortial framework built around those values and designed with the operational realities of smaller, thinly staffed institutions in mind has strong potential for broad adoption.

The next step is translating these findings into actionable pilot projects and policy alignment efforts. BLC and PALCI are positioned to serve as a model for cross-consortial collaboration, and the practitioner insight gathered here provides a foundation that future consortial partnerships can build on as this work scales.