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BOSTON LIBRARY CONSORTIUM

Resource Sharing Software at a Crossroads:

An Investigation from the Boston Library Consortium

Marc Hoffeditz, BLC

Southeast Resource Sharing Conference

October 22, 2026

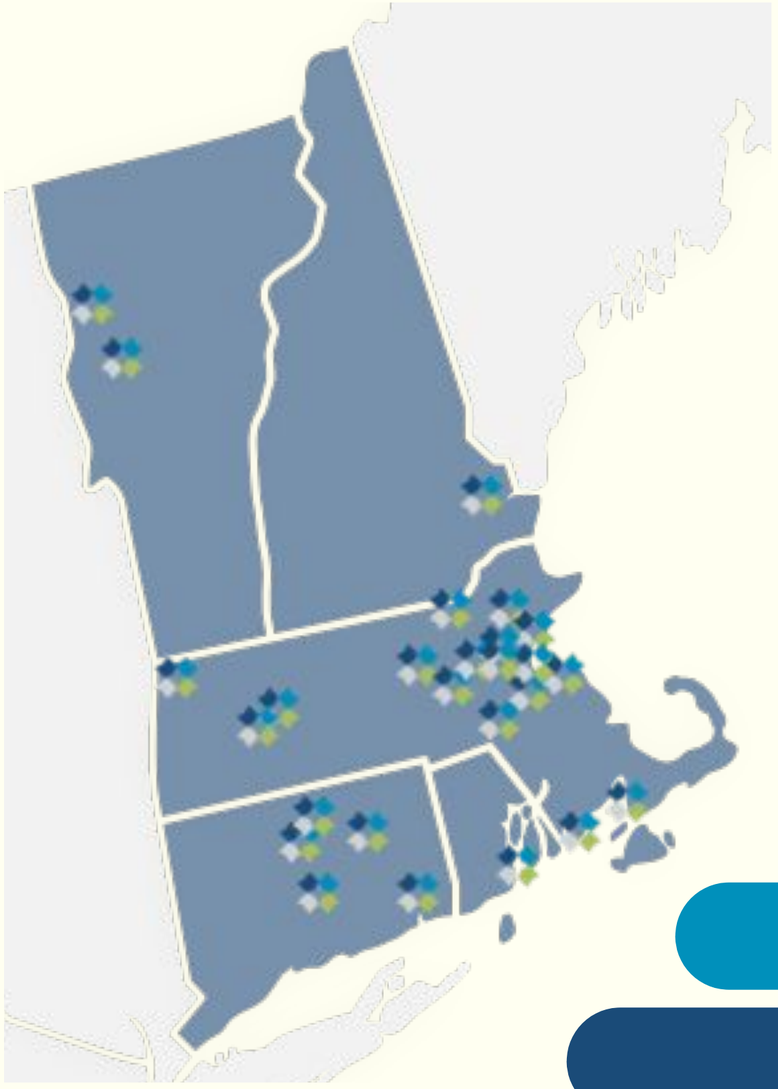
Outline

- BLC background & resource sharing activities
- Background of ILL Systems Evaluation initiative
- Evaluation Criteria for Resource Sharing Software
- Request for Information (RFI) Process
- Key Themes from RFI Responses
- Closing Thoughts
- Q & A

Our Mission

The Boston Library Consortium empowers a coalition of libraries in the northeastern United States to share knowledge, infrastructure and resources at scale. - [blc.org](blc.org)

Bentley University
Boston Arch. College
Boston College
Boston Public Library
Boston University
Brandeis University
Connecticut College
Internet Archive
MBLWHOI Library
Middlebury College
Northeastern University
Smith College
State Library
Trinity College
Tufts University
UMass Amherst
UMass Boston
UMass Chan Medical School
UMass Dartmouth
UMass Lowell
University of Connecticut
University of Hartford
University of New Hampshire
University of Rhode Island
University of Vermont
Wellesley College
Wesleyan University
Williams College



An Evolving Landscape:
The Catalyst for Proactivity

RAPID ILL
Now part of ExLibris
Part of Clarivate

Tipasa™
cloud based interlibrary loan management
OCLC



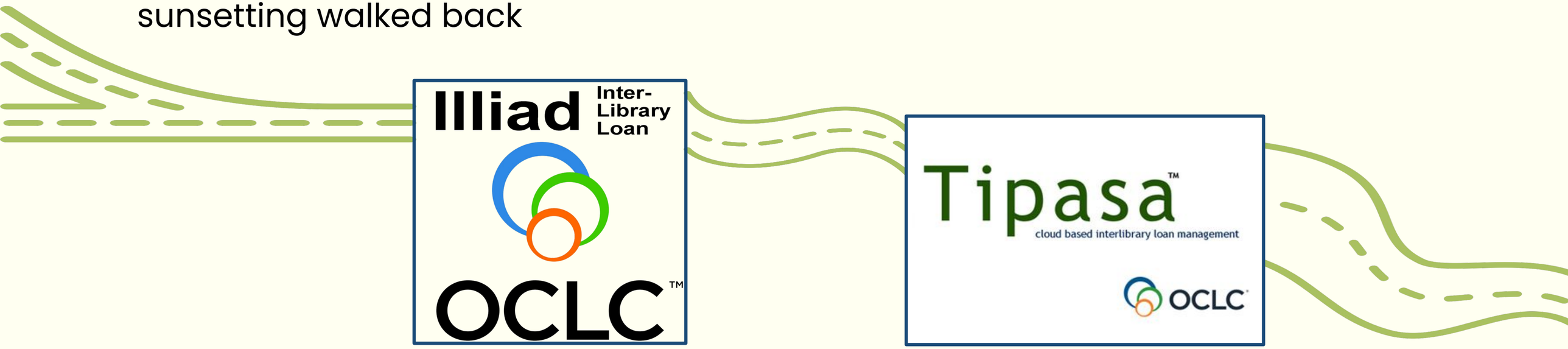
ReSHARE

An Evolving Landscape:
The Catalyst for Proactivity

Tipasa

2017: OCLC introduced Tipasa, a cloud-based ILL system; announced that ILLiad would be sunsetted.

2018: Mandated migration over phases, with IDS libraries moving in 2020; sunsetting walked back



An Evolving Landscape:
The Catalyst for Proactivity

RapidILL

2018: RapidILL began to develop Project Bedrock, a vision of an end-to-end resource-sharing broker system.

2019: ExLibris acquired RapidILL

2021: ExLibris acquired by Clarivate; Rapido announced, Project Bedrock would be incorporated into future resource sharing solution (Rapido)

An Evolving Landscape: The Catalyst for Proactivity

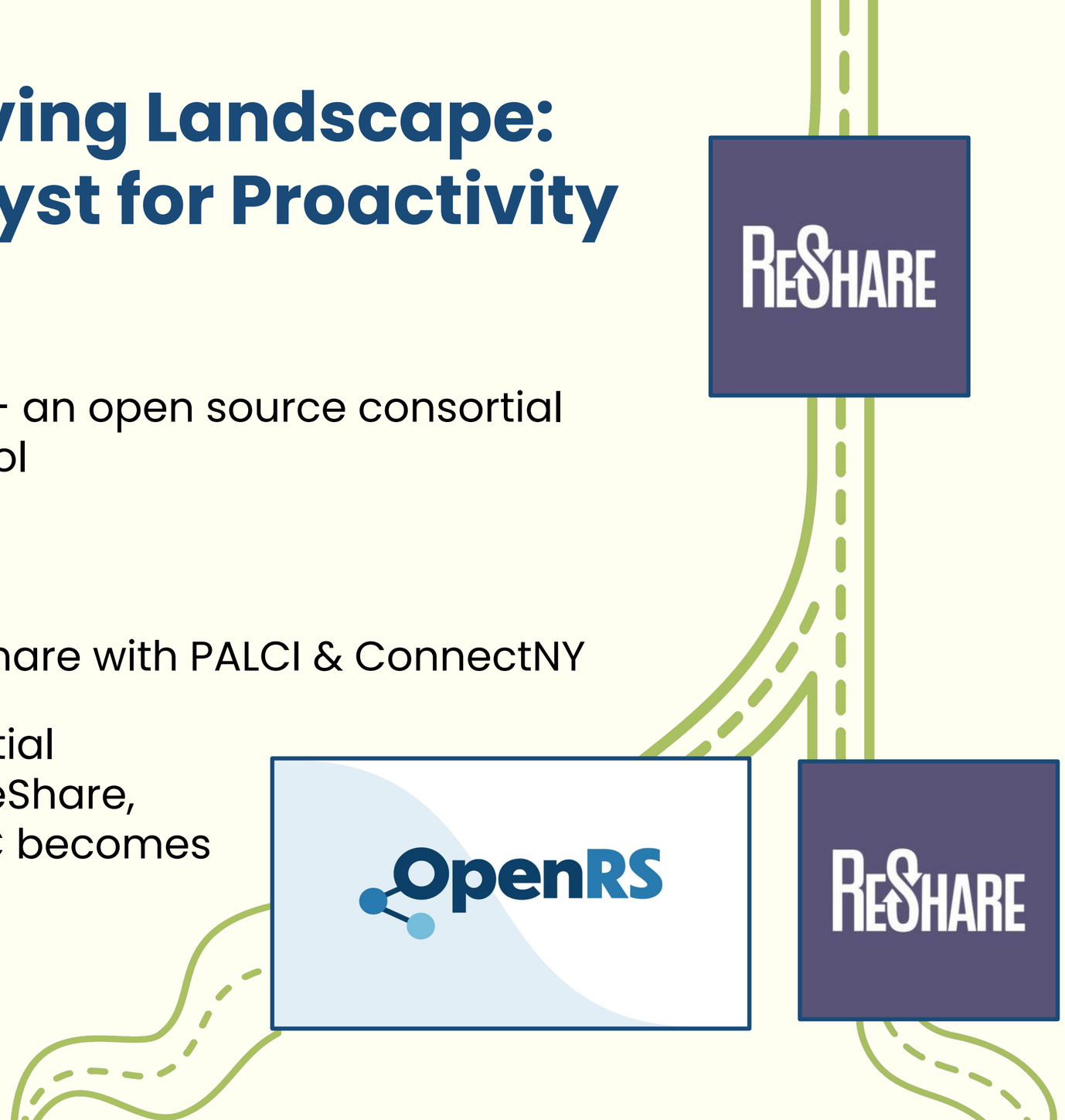
ReShare

2018: Project ReShare announced - an open source consortial resource sharing management tool

2020: ReShare version 1.1 live

2021: First implementations of ReShare with PALCI & ConnectNY

2023: Emergence of Direct Consortial Borrowing (DCB) product under ReShare, cohort left to develop OpenRS; BLC becomes fiscal sponsor for Project ReShare



A Decade Later...



BLC's Response

- BLC met with OCLC, asking for response on questions we had about Tipasa
  - Became the foundation for our evaluation criteria & RFI
- Vendor meetings to understand systems landscape
- Preliminary efforts to develop robust criteria to evaluate resource sharing software in 2021, revived during 2023 strategic action plan development

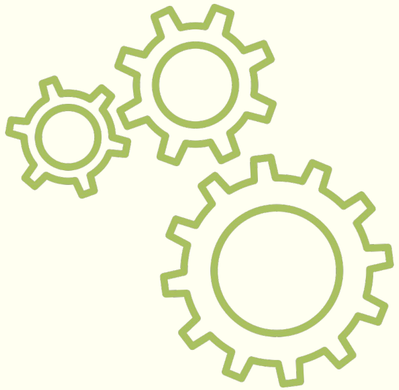
General Questions
Demos Available
Complete web-based application
Customizable patron web interface that integrates with the look and feel of library systems
Allows patrons to submit requests, check the status of requests, register for ILL, manage their own details like email and postal addresses, etc.
Self-contained patron authentication or connect to library's local directory
Centralized access to complete history, email communication, update options
Supports paperless operations
Automatic data importing, including call #
Allows different levels of permissions
Ability to attach files to notifications (e.g. PDFs, invoicing, articles, etc.)
System Integration *(We rely upon highly customized functionality with NCIP, Docline, RapidILL, and IDS Project to provide smart and efficient functionality to unmediate workflows. We also use OpenURL.)*
Functionality includes both returnables and non-returnables
Open for continued IDS functionality
NCIP functionality (for integration with circulation systems)
Automated check of local holdings
Automated interface with OCLC, Docline, Rapid, and other resource sharing platforms
Automated check of union catalogues
Create requests with just PubMed number(s)
OpenURL compliant
Provides robust SQL Server data management system
CDL functionality
Shared Server Model *(Some of our libraries work under the shared server model, and have developed workflows and hired staff based on this arrangement.)*
Offers shared server model
Able to access other libraries' interfaces
Supports separate webpages for each library
Allows the inclusion of several symbols per instance
Data and Metrics *(We heavily rely upon ILLiad's ability to do robust customized searches, and we use these customized reports to provide information for collection building and also for liaison-based activity, among other things.)*
Provides a robust, customizable search interface
Ability to automate data import to visual analytics platform (e.g. Tableau)
Analytics functionality (e.g. export and visualize data)
Ability to modify Aand cuystomize reports
Ability to customize queries and reports
Ability to export data in multiple formats (Excel,)

ILL Systems Evaluation Working Group

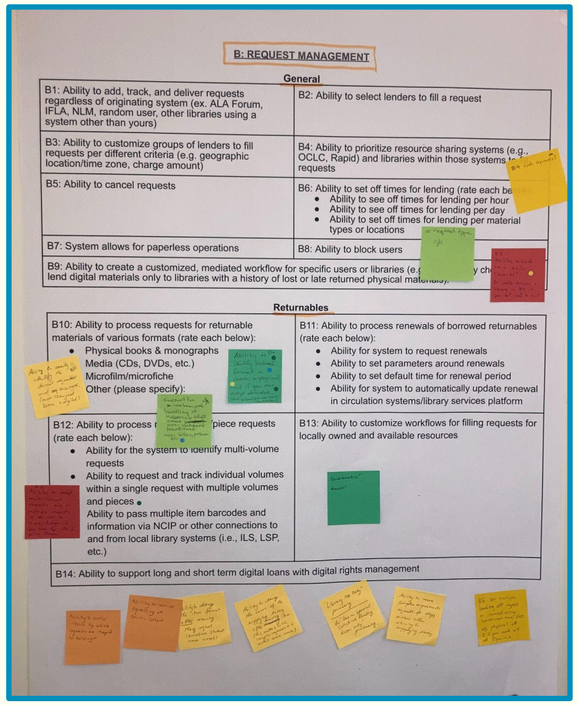
- Working group met from June 2024 - February 2026

- Charge: Identify a set of required and desired attributes for our resource sharing solutions, articulating consortial priorities for our resource sharing software, and guiding BLC staff on future vendor engagements and negotiations.

- Membership:
  - **Angie Batson**, *Wellesley College*
  - **Emily Lavins**, *Boston College*
  - **Erika McNeil**, *University of Connecticut*
  - **Heather Klish**, *Tufts University*
  - **Judy Rabinowitz**, *Tufts University*
  - **K. Zdepski**, *University of Massachusetts - Amherst*



Development, Engagement, & Prioritization with BLC Community

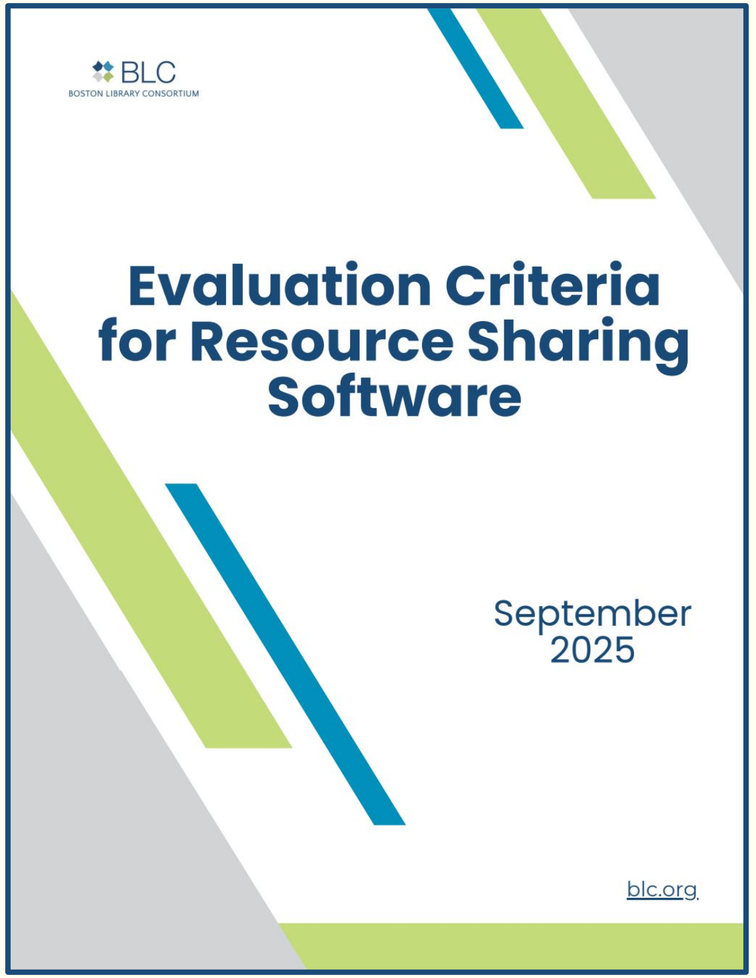








Evaluation Criteria for Resource Sharing Software



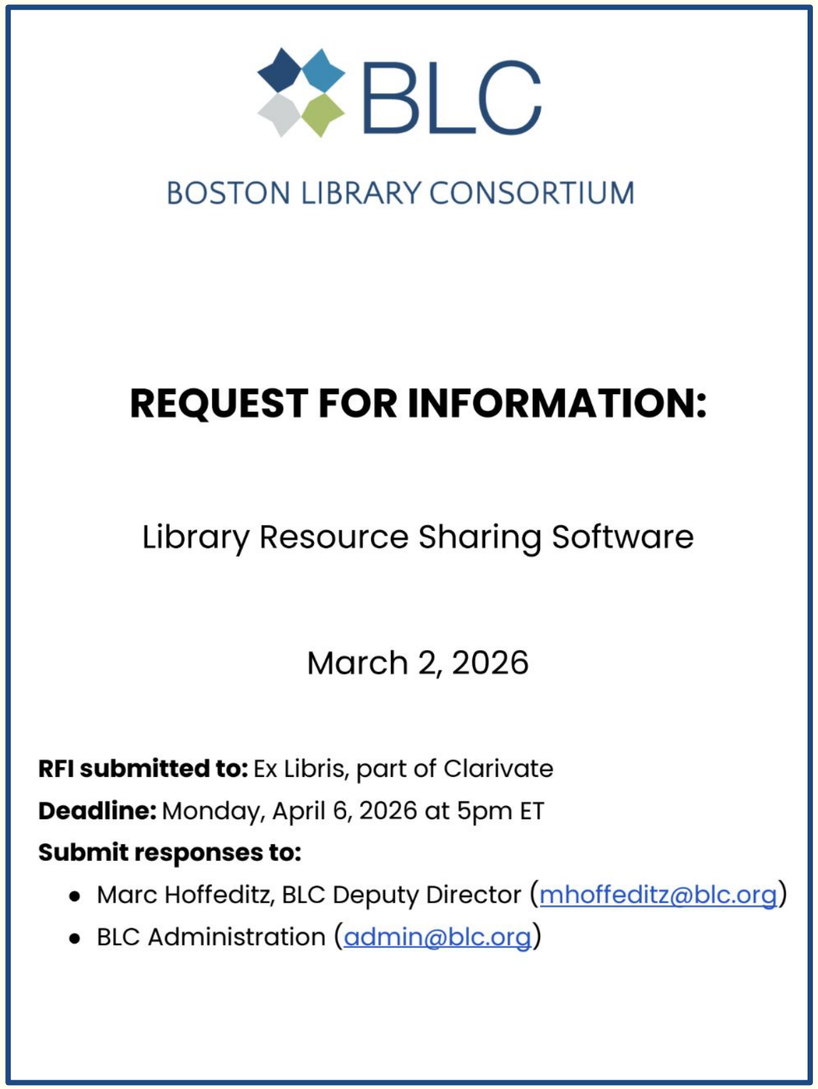
- Report released in September 2025
- Seven adaptable criteria categories:
  - **A:** Accessibility
  - **B:** Request Management
  - **C:** Customization
  - **D:** Statistics & Reporting
  - **E:** User Authentication & Authorization
  - **F:** System Integration
  - **G:** Vendor Support
- Evaluation criteria translated into RFI for prominent resource sharing software vendors

Request for Information (RFI) Process

- Response period: March - April 2026

- RFI in two parts:
  - **Part 1: Vendor Information**
    - Company overview
    - FTE (Sales, R&D, Support, etc.)
    - Industry experience/position

  - **Part 2: Software Functionality**
    - Brief and detailed responses
    - Brief response categories:
      - ***Complies***
      - ***In Development***
      - ***Planned***
      - ***Deviates***
      - ***Not Planned***



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REQUEST FOR INFORMATION:

Library Resource Sharing Software

March 2, 2026

RFI submitted to: Ex Libris, part of Clarivate
Deadline: Monday, April 6, 2026 at 5pm ET
Submit responses to:

- Marc Hoffeditz, BLC Deputy Director (mhoffeditz@blc.org)
- BLC Administration (admin@blc.org)

RFI Responses

Vendors	Responses Submitted/Software Products
Clio	**Not submitted:** Clio
Ex Libris	**Submitted:** Rapido **Not submitted:** Alma Resource Sharing, RapidR/ILL
OCLC	**Submitted:** WorldShare, Tipasa, ILLiad, RS4G **Not submitted:** RelaisD2D, RelaisILL
OpenRS	**Submitted:** OpenRS
RSCVD	**Not submitted:** RSCVD
Project ReShare	**Submitted:** ReShare
Soutron Global	**Submitted:** Autographics/SHAREit

Before we drive off....



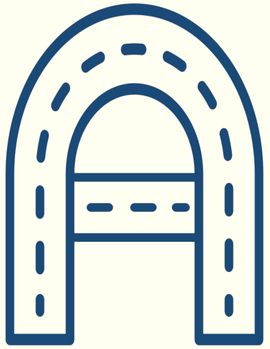
Before we drive off....

- Generally focusing on the forest, not the trees
- Responses submitted in April 2026, things may have changed in subsequent updates that may not be reflected here
- Level of detail in responses varies, challenging to provide comparisons in some cases
- Summarization is based on responses provided in the RFI - this may differ from your personal experiences or thoughts!

Accessibility: Requirements & Standards

- **Majority compliance with Web Content Accessibility Guidelines (WCAG)**
  - ***2.2 AA***: SHAREit
  - ***2.1 AA***: ILLiad, OpenRS, Rapido, RS4G, Tipasa, WorldShare ILL
  - One exception is ReShare
    - *Patron discovery (VuFind) has VPAT*
    - *Staff tenant: key issues identified & VPAT in development*

- **Variance in availability of VPATs/ACRs**
  - ***Publicly available*:** OpenRS, Rapido (for Alma & PrimoVE), ReShare (VuFind), SHAREit
  - ***Request only*:** OCLC products (ILLiad, RS4G, Tipasa, WorldShare ILL)

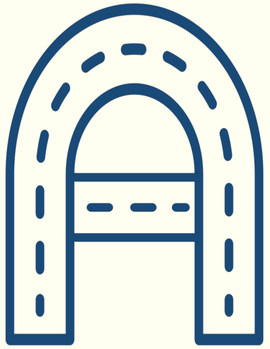


Accessibility: Staff User Experience

- **Majority web browser based**
  - ILLiad is the exception for hybrid offerings:
    - *Standard Client (downloaded, requires Windows)*
    - *Upcoming Staff Web Client (browser based)*
  - Responsive through most common browsers (Chrome, Edge, Mozilla)

- **Adjusting visual elements (page size, change font/sizes, color contrast)**
  - Reliance on browser rather than customizability of the software internally
  - Recommendations to use extensions to support any specific needs

- **Screen reader broadly supported, but implemented differently**
  - ***JAWS, NVDA, and VoiceOver:*** Rapido, Tipasa
  - ***FOLIO/Okapi Stripes*:** ReShare
  - ***Compliant/no specifications*:** SHAREit, OpenRS, RS4G
  - ***ILLiad*:** Staff Web Client in development, not available on desktop client

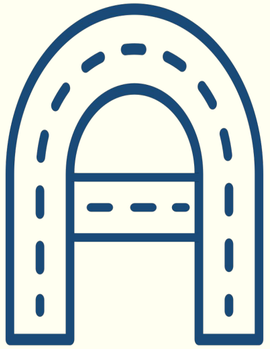


Accessibility: Patron User Experience

- **Patron user functionalities include:**
  - Check status of request, view requested electronic materials, manage personal details, register for an ILL account, submit requests, note desired level of service, view notifications

- **Reliances on integrated library systems (ILSs) and other systems:**
  - ***Discovery*:** OCLC Products (WorldCat), ReShare (VuFind), Rapido (PrimoVE)
  - ***Patron account details*:** OpenRS, Rapido (Alma), ReShare

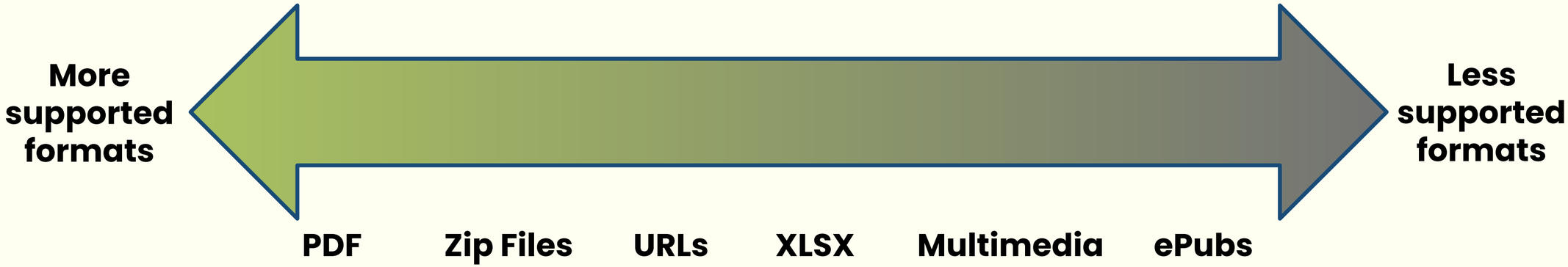
- **WorldShare ILL requires more staff mediation:**
  - Patrons must ask staff about request statuses, personal details management, manual management of pickup locations, request submission through mediated form/connected discovery layer



Request Management: Lending Formats

- **Physical lending formats - broadly supported!**
  - ✅ Books/monographs, physical media, microfilm (oh my!)

- **Digital lending formats - ehhh.....**

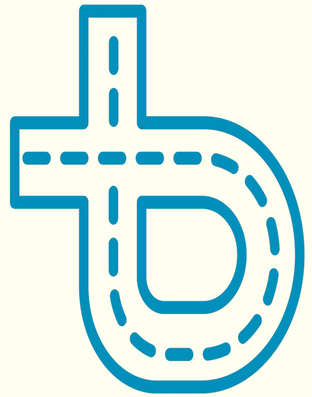


*Distinction between **digital delivery** vs. **digital lending***

Request Management: Billing & Copyright

- **Billing**
  - Distinction between policy setting/tracking billing amounts and payment reconciliation
    - IFM dominant (OCLC products + Rapido)
    - Other electronic payments less compliant: EFTS > ACH > Credit cards
  - Reliance on ILS or external solutions for payment reconciliation solutions
  - Updated ISO 18626 is planning for creation of payment extensions between requesting & supplying libraries

- **Copyright management**
  - Relatively mature across products
  - Variance amongst how detailed the parameters can be set, less flexibility for evaluation timeframes
  - ReShare use of ISO copyright codes



Customization

- **Workflow, Task Lists, and Queues**
  - ***More configuration:*** ILLiad, Rapido, ReShare, SHAREit
  - ***Less configuration:*** OpenRS, RS4G, Tipasa, WorldShare

- **Overall support for mediated and unmediated workflows**
  - Less options for WorldShare ILL, Not Planned for OpenRS

- **Overall support for customizing/prioritizing fulfillment networks**
  - All Complies except for OpenRS (Planned)

- **Architecture varies shared server capabilities**
  - ***Multi-tenant architecture:*** ReShare, SHAREit
  - ***NVTGC:*** ILLiad
  - ***Local and/or central processing:*** Rapido
  - ***Not applicable/separate institutions:*** RS4G, Tipasa, WorldShare ILL

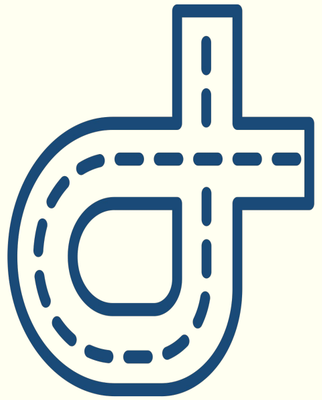


Statistics & Reporting - Key Themes

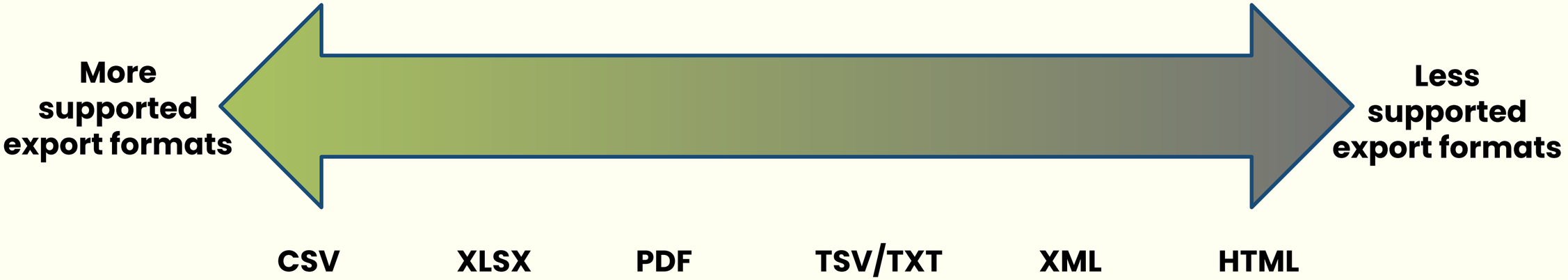
- **Reporting capabilities are broadly available, variation in:**
  - *Depth of searching (filtering, querying terms)*
  - *Types of template reports*
  - *Control over underlying data & tables*

- **Report customization supported by:**
  - *Data export* (SHAREit)
  - *Predefined filters* (OpenRS)
  - *SQL Querying/ILLiad Web Platform* (ILLiad)
  - *Oracle Analytics* (Rapido)
  - *Library Data Platform* (ReShare)
  - *WorldShare Reports/OCLC Usage Statistics* (RS4G, Tipasa, WS ILL)

Does functionality simply pull data or exist in a dynamic ecosystem?



Statistics & Reporting - Exports & Data Visualization



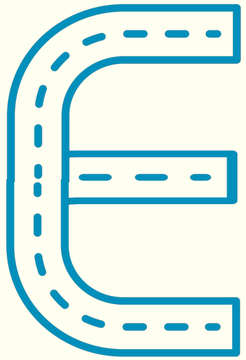
- **Split in built in data visualization features**
  - ***Built in:*** ILLiad, Rapido, RS4G, Tipasa
  - ***Export/connect to tool:*** OpenRS, ReShare, SHAREit, WorldShare ILL

- **Native connections to data visualization platforms less common**
  - Available in ILLiad, Rapido (user created), ReShare (through LDP)

User Authentication & Authorization

	ILLiad	OpenRS	Rapido	ReShare	RS4G	SHAREit	Tipasa	WS ILL
CAS	✅		✅	✅			✅	
LDAP	✅		✅	✅			✅	
SAML	✅	✅	✅	✅		✅	✅	
Social Logins		✅	✅				✅	
System-Based Logins	✅	✅	✅	✅	✅	✅	✅	

- **Utilize more than one authentication/identity management method**
  - ***Yes:*** ILLiad, OpenRS, Rapido, SHAREit, Tipasa
  - ***No:*** ReShare (could be scope for future work), RS4G, WorldShare ILL



Systems Integration - Interoperability Standards

OpenURL Compliance	ISO 10161 (ILL Communication)	ISO 23950 (Retrieval via Z39.50)	ISO 18626 (Modern ILL message exchange)
All Complies	**All Complies, except:** **Deviates** WorldShare ILL **Not Planned** OpenRS ReShare	**All Complies, except:** **In Development** Open RS	**All Complies, except:** **In Development** ILLiad (v.10) SHAREit WorldShare ILL **Planned** ReShare (2017 > 2027)



Systems Integration - Discovery & Circulation

- **DISCOVERY - multiple integrations are common across the board**
  - ***Common discovery layers*:** EDS, VuFind, Primo/PrimoVE, Summon, WorldCat/WorldCat Discovery
  - ***Alternative discovery sources*:** Trove/CAVAL & National Library of Australia for ReShare
  - ***Multiple means of integrations, including*:** APIs, NCIP, OAI-PMH, OpenURL connections, Z39.50

- **CIRCULATION - reliance on connective protocols OR underlying ILS**
  - ***Alma*:** Rapido
  - ***APIs*:** ILLiad, OpenRS
  - ***ISO 18626*:** OpenRS, SHAREit (in development)
  - ***NCIP*:** OpenRS, ReShare, RS4G, SHAREit, Tipasa
  - ***SIP2*:** SHAREit
  - ***Web Circ*:** ILLiad
  - ***WorldShare Management Services (WMS)*:** WorldShare ILL



Systems Integration - ILL Networks

- **Systems may participate in a network, act as a network broker, or both**

- **Most support consortial/brokering networks, but architecture varies:**
  - ***Custom Holding Groups/Paths & Profiled Groups, Automated Request Manager:*** OCLC Products
  - ***ISO:*** OpenRS, Rapido, SHAREit
  - ***ISSI:*** SHAREit
  - ***Pods:*** Rapido
  - ***Separate Networks:*** ReShare (with Trove/CAVAL)

- **Currently less testing with CrossLink:**
  - ***Complies:*** ILLiad (active testing), ReShare
  - ***Deviates:*** RS4G, Tipasa, WorldShare ILL
  - ***Not Planned:*** Rapido, OpenRS, SHAREit



Vendor Support - Enhancement Requests

- **Community submission of enhancements & engagement with ideas varies**
  - ***Meetings/discussions*:** SHAREit, OpenRS,
  - ***Online platform to vote/comment*:** ILLiad, Rapido, RS4G, Tipasa, WSILL
  - ***Mixed*:** ReShare

- **Cadence of review for enhancement ideas:**
  - ***Annually*:** SHAREit, Rapido, ReShare (between 6 months - 1 year)
  - ***"Ongoing basis"*:** ILLiad, OpenRS, RS4G, Tipasa, WorldShare ILL

- **How are decisions made?**
  - ***Community input > Product/technical managers*:** ILLiad, RS4G, SHAREit, Tipasa, WSILL
  - ***Community input > Community voting via points*:** Rapido
  - ***Mixed approaches*:** ReShare

<u>Governance models for community enhancement are not always clear.</u>

Let’s Pause



Resource Sharing Software at a Crossroads

Interoperability

Agency



Community

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Thank you for listening!

Questions?