A Tale of Two Consortia: Developing a Scalable Framework for Cross Consortial Resource Sharing

A Joint Initiative of PALCI and the BLC

Southeast Resource Sharing Conference
October 23, 2026

Marc Hoffeditz, *BLC*
Carl Piraneo, *PALCI*

PALCI | BLC BOSTON LIBRARY CONSORTIUM

Agenda

01 Introduction and Background

02 Community Expectations Assessment Report

03 Consortial Collaboration Framework

04 Building Your Own Partnership

05 Next Steps and Q&A

PALCI | BLC BOSTON LIBRARY CONSORTIUM

SECTION 01

Introduction and Background

Consortial Context

PALCI

Mission
Enable cost-effective and sustainable access to information resources and services for academic libraries in Pennsylvania and surrounding states.

Strategic Priorities
- Collaborative Infrastructure
- Scalable Innovation
- Shared Stewardship

5 States (DE, NJ, NY, PA, WV)

82 member institutions

PALCI

BLC

Mission
Empower a coalition of libraries to share knowledge, infrastructure, and resources at scale.

Strategic Priorities
- Resource Sharing
- Professional Development
- Licensing & Content
- Shared Systems & Services

5 States (CT, MA, NH, RI, VT)

28 member institutions

BLC
BOSTON LIBRARY CONSORTIUM

A Tale of Two Consortia

It was the best of times.

2023 analysis of BLC's borrowing and lending activity from 2018-2022

Data points included:

- Shifts in individual institutional borrowing & lending activity
- % of borrowing/lending activity within current networks (Rapid, OCLC, ISO)
- % of borrowing/lending between BLC & other consortia

It was the worst of times.

Data cleanup and analysis of 260 spreadsheets...



PALCI | BLC BOSTON LIBRARY CONSORTIUM



A Tale of Two Consortia

It was the epoch of belief.

Launch of PALCI/BLC Consortial Collaboration Working Group in January 2026

Charge: Guide and support the development of cross-consortial resource sharing strategies and tools between BLC and PALCI

Preliminary outputs:

- Community Expectations Assessment Report (CEAR)
- Consortial Collaboration Framework for Resource Sharing

Bi-weekly meetings on Zoom from January to June 2026

PALCI | BLC BOSTON LIBRARY CONSORTIUM

A Tale of Two Consortia

It was the epoch of belief.

Members of the Consortial Collaboration Working Group

Angie Batson, *Wellesley College* **Molly Dupere**, *Northeastern University* **A'Llyn Ettien**, *Boston University* **Marc Hoffeditz**, *BLC* **Stephanie Kaceli**, *Cairn University* **Sylvie Larsen**, *University of Pennsylvania* **Jacob Long**, *Bryn Mawr College*	**Jennifer Loubriel**, *The New School* **Scott Lovelette**, *University of Vermont* **Sadie Marston**, *University of Massachusetts - Amherst* **Carl Piraneo**, *PALCI* **Vanessa Sanjuan-Miranda**, *Gettysburg College* **Dev Singer**, *Brandeis University* **Kate Wolfe**, *Wesleyan University*

NOT

It was the epoch of incredulity.

PALCI | BLC BOSTON LIBRARY CONSORTIUM

SECTION 02

Community Expectations Assessment Report

Purpose of the CEAR

What It Is

- Companion example piece to the Framework
- Centers experiences of frontline resource sharing service professionals
- Foundation for future planning, pilot projects, and policy alignment

What It Isn't

- Governance decisions
- Binding agreements
- Final technical builds
- Vendor evaluations

Process

1

Documentation Review

Examined and compared consortia policies and internal documents

2

Survey

Gathered data on where current consortial workflows differed from other workflows

3

Focus Groups

Focused on exploring practitioner experiences and getting a sense of barriers

PALCI | BLC BOSTON LIBRARY CONSORTIUM

Methodology

Documentation Review

Reviewed two internal documents detailing consortial policies, one from each institution, over the course of a month while sending out the survey.

Survey

Survey was emailed to both consortial listservs on March 4th, 2026 with 8 days allowed for responses.

It received 98 responses, including:

- 32 respondents from 21 BLC member libraries (an 84% institutional response rate)
- 66 respondents from 58 PALCI member libraries (a 73% institutional response rate)

Focus Groups

Four focus group sessions were conducted via zoom on April 6th and 7th, 2026.

- Two sessions were focused on exploring practitioner experiences in resource sharing and two centered on systems and technology-related integrations.
- The total attendance for the focus groups was 45 for the practitioner experience sessions and 38 for the systems-focused sessions.

CEAR Highlights

Foundational Priorities

- Policy alignment must come first
- Shared infrastructure must work within existing systems
- A maintained directory is a prerequisite

Key Barriers

- Staffing capacity and student worker reliance
- System interoperability and silent failures
- Digital fulfillment challenges

What practitioners asked for, above all, was predictability. Clear expectations, systems that behave consistently, and communication channels that do not require workarounds.

Pg. 29

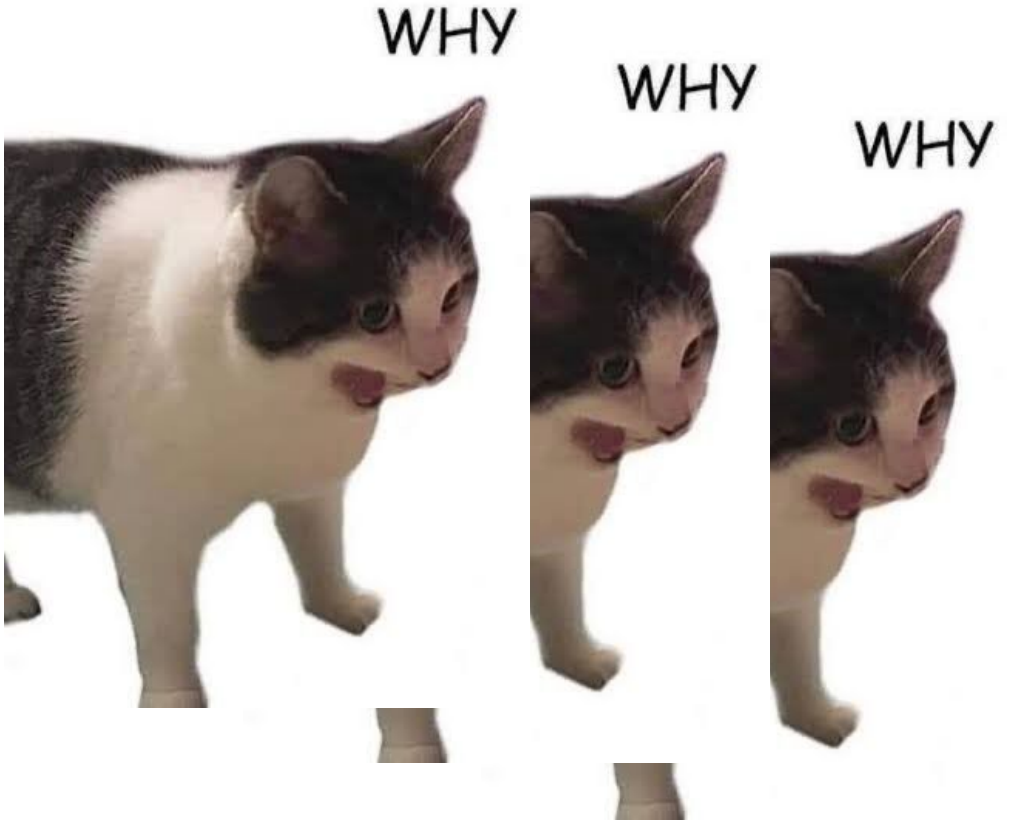
SECTION 03

Consortial Collaboration Framework

Consortial Collaboration Framework

Foundations

1. **Articulate the “why?”**
2. **Choose a level of integration**
3. **Draft a Community Expectations Assessment**



PALCI | BLC BOSTON LIBRARY CONSORTIUM

Pillar 1



Policy Alignment

- **Tier 1: Basic Collaboration**
  - Fees, formats, loan periods/due dates, renewals, recalls, damaged/lost items, multi-volume requests, communication structures/expectations
- **Tier 2: Moderate Collaboration**
  - Pull slip/book bands, turnaround times (requests & shipping), quality control/requirements, problem resolution
- **Tier 3: Advanced Collaboration**
  - Special collections lending, preferred shipping carriers, reciprocal on-site access

Pillar 2



Software & Technical Infrastructure

- **Step 1:** Software Identification
- **Step 2:** Consortial Grouping
- **Step 3:** Evaluation of Existing Software Solutions
- **Step 4:** Aligning Systems with the Desired Level of Collaboration
- **Step 5:** Formulating an Integration Plan

PALCI | BLC BOSTON LIBRARY CONSORTIUM

Pillar 3



Communication & Social Infrastructure

- **Step 1:** Collecting Relevant Information
- **Step 2:** Creating the Directory
- **Step 3:** Maintaining the Directory
  - Informal Communication
  - Joint meetings



PALCI | BLC BOSTON LIBRARY CONSORTIUM

Establishing & Sustaining Partnerships

Financial Implications

including shipping, staffing, supplies such as book straps, and implementation and maintenance fees for software

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 sign-off from a governmental agency

Vehicles for formalizing the partnership

whether that be a contract or memorandum of understanding

Formally announcing the partnership

including timelines and alignment of communication channels and/or press releases

"A wonderful fact to reflect upon, that every [library consortium] is constituted to be that profound [collaborative] mystery to every other." - Charles Dickens, *A Tale of Two Cities*
(Probably. I mean, don't quote me on it..)

PALCI | BLC BOSTON LIBRARY CONSORTIUM

Establishing & Sustaining Partnerships

Models for Implementation

- Pilot Group
- Phased or Tiered Implementation
- All-at-Once Implementation
- Opt-In Participation
- Roadmaps



Sustaining the Partnership

- Oversight & Governance
  - Staff-Only Administrative Oversight
  - Collaborative Steering Committee
- Oversight Practices, regardless of governance model
- Collecting Borrowing & Lending Statistics
- Overall Assessment Plan

PALCI | BLC BOSTON LIBRARY CONSORTIUM

SECTION 04

Building Your Own Partnership

Building Your Own Partnership

Four ways to begin, whatever your starting point.

You don’t have to do all of it

The framework is adaptable, not prescriptive. Pick the elements that fit your membership, goals, and context.

Start where you are

The lowest-effort entry point is simply agreeing not to charge one another. Everything else can grow from there.

Run your own assessment

Use a documentation review, member survey, and focus groups to create your own Community Expectations Assessment Report.

Follow the sequence

For PALCI and the BLC: Align policies first, then work within existing systems, and treat a maintained directory as a prerequisite.

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.

From: Community Expectations Assessment Report conclusion, page 29

SECTION 05

Next Steps for PALCI and the BLC

What's next

In the near term

- Monitoring the progress between the CrossLink and ReShare integration and the release of ILLiad 10.
- Those development projects are expected to solve some of the technical requirements for a cross-consortial network by expanded integrations between CrossLink, ReShare, ILLiad, and Rapido.
- Future pilot projects will be based on testing the technical while continuing to building the social.

On the horizon: Consortia CONNECT

- Consortia CONNECT: BLC, PALCI, and the IDS Network.
- In addition to operationalizing the Consortial Collaboration Framework, the project would work to develop an Open Directory Service.
- Funding avenues are currently being explored.

PALCI | BLC BOSTON LIBRARY CONSORTIUM

Download the Framework!



Thank You

Questions?

mhoffeditz@blc.org | carl@palci.org