

NLG-L Program Goal 5 Addressed: Strengthen the ability of libraries, archives, and museums to work collaboratively for the benefit of the communities they serve.

Objective 5.1: Support the development of replicable systems that leverage institutional expertise and experience to maximize public access to and use of knowledge resources.

Brief Summary: Cross-Share is a novel technological approach that connects underlying systems so that libraries can help patrons to request materials from multiple sources. It will allow for discovery and availability lookups across multiple cataloging systems then provide for a connection between the borrowing and lending libraries' resource sharing systems, regardless of which types they are, using the ISO 18626 protocol. Users are often restricted to requesting research materials from within the networks of the libraries that serve them. This is due to restrictions between systems that won't currently allow other libraries' materials to be discovered, requested, or fulfilled. Cross-Share will help libraries and users expand access beyond the current restrictive environments. To patrons, it would work seamlessly. For libraries, they can continue to use existing workflows and not need to run multiple systems to access multiple networks.

PROJECT JUSTIFICATION: Over the past decade, multiple resource sharing systems have been developed and put into use. While some have built-in ways of sharing requests across the systems, they are not effective due to limited communication between systems and often create additional workload that is not possible with the reduced staffing at many libraries. By creating a two-layered system of discovery and resource sharing system connections, we will allow libraries to share materials among all the current and future systems in a more streamlined and effective way. Additionally, Cross Share will expand the ability of libraries without local technical expertise or that have severe resource constraints to share between networks.

PROJECT WORK PLAN: The work plan includes four phases: 1) Planning and Design (August to December, 2023), 2) Production and Iteration based on pilot testing (January to June, 2024), 3) Alpha/Beta Testing and Iteration (June to December, 2024), and 4) Evaluation and Production Release with ongoing formative evaluation (Completed July 2025).

The initial planning and design will take place virtually among all the members of the team. Weekly meetings will be held to lay out structure, including resource sharing systems, API options, and ISO requirements. Production will begin shortly after the first few meetings in order to determine issues early and to re-evaluate options. Iterations will continue until we are ready to alpha test at two libraries using different systems.

The discovery layer will be based on the Reshare system's holdings and lookup that Index Data developed.

Cross-Share – ISO Resource Sharing System to Re-Connect Siloed Libraries

IDS Project/SUNY Geneseo

Cross Share will link into this variation on the holdings data allowing it to determine which library has the items requested by the borrowing library and then linking into the lending libraries system.

DEMONSTRATED EXPERTISE: The IDS Project has been at the forefront of resource sharing innovation for nearly two decades and has won several awards for these innovations. The most recent was for the development of the IDS Logic system. IDS Logic is a middleware solution which automated many steps of processing resource sharing requests using ILLiad, OCLC Resource Sharing, RAPID, Copyright Clearance Center, and Reprints Desk, along with other systems. IDS Logic demonstrates that IDS Project has a track record of developing successful middleware solutions.

Index Data is a software company specializing in creating innovative products and tools for the library ecosystem – with a track record of over 25 years delivering manageable, scalable, high-performing software to address big and complex challenges.

The project planning team will include Mark Sullivan, IDS Executive Director, Sebastian Hammer, President of Index Data, Michael Mulligan, the developer of IDS Logic, developers from Index Data, and four resource sharing experts.

DIVERSITY PLAN: The Cross-Share system will connect libraries serving diverse populations, that have limited resources, to other libraries. Access to resources for underrepresented groups is an important benefit of Cross-Share.

DISSEMINATION: Cross-Share will be hosted by the IDS Project on web servers that we support and maintain. Webinars and conference presentations will be developed to bring widespread awareness of this project.

PROJECT RESULTS: Cross-Share will allow libraries with minimal resources to have access to a larger pool of public and academic resources through a discovery and fulfillment system. While this pilot project would initially be among IDS member libraries (125 libraries), the potential number of libraries that could benefit from Cross-Share is much higher. The potential to share among different types of libraries, such as local public and academic libraries would be greatly increased at minimal cost.

BUDGET: The project requests \$240,000 total IMLS funding - \$160,000 for contract payments to Index Data for work to be performed, \$27,200 for servers at Rackspace for Cross Share implementation and production, and \$52,800 (F&A – SUNY Geneseo’s negotiated off-campus rate: 22%).