

Narrative

Project Justification.

The Boston Library Consortium (BLC) is requesting \$249,221.14 for a two-year implementation grant addressing NLG Goal 3 and Objective 3.2 to support and scale the implementation of a reusable and sustainable solution enabling controlled digital lending (CDL) as a component of libraries' interlibrary loan (ILL) services.

CDL enables libraries to lend legally acquired materials in a digital format under controlled conditions. The COVID-19 pandemic catalyzed an emerging consensus in libraries and consortia that CDL is a desirable, feasible, and high-impact method of lending that replicates the rights afforded to libraries for ILL, itself a foundational library practice long empowered by copyright law and protected by Congress. Through CDL, libraries can dramatically improve access to collections by enabling patrons to obtain digital access to items otherwise available only in print. As a result, CDL promises to be a transformative practice that will significantly benefit all library patrons.

Without CDL, patrons cannot access most library books digitally. As few as 10% of academic books are available to academic libraries as licensed ebooks, according to a [2018 SCONUL study](#). The lack of digital access to needed materials can undermine research productivity and learning outcomes. CDL overcomes this limitation by offering patrons the choice of format best suited to their needs. It supports patrons who may be medically quarantined, homebound, traveling, studying abroad, on sabbatical, lacking transportation, or otherwise unable to access physical materials because of geographic distance, online/hybrid modes of teaching and learning beyond the campus, or other constraints. CDL will enhance the effectiveness of teaching and learning by facilitating equitable access to library materials in whatever format that best meets the needs of patrons wherever they are and however they conduct their work.

In parallel, CDL promises to make resource sharing more environmentally sustainable by reducing the financial and environmental costs of mailing books between libraries. (BLC is projected to spend over \$175,000 to ship physical materials between its members in 2022-23.). Finally, CDL will facilitate the preservation of collections by providing digital access to materials that are unsuitable for shipping and handling or out-of-library use. Preservation is vital for print materials that are committed to shared print programs (e.g., Eastern Academic Scholars' Trust) or held in archives and special collections that are too valuable or rare to ship.

By transforming how patrons access physical collections, consortial CDL is a value multiplier for library consortia nationwide, amplifying the benefits of engaging in CDL at a local level. BLC's vision for consortial CDL is for all consortium member's patrons to have convenient access to the consortium's collective content in the format of their choice. While the short-term target group of this proposed initiative is the libraries of BLC's member institutions, the long-term, ultimate beneficiaries are library consortia and libraries generally. Together, BLC's 26 member institutions serve more than 500,000 students, faculty, and scholars. BLC envisions its consortial implementation of CDL as a stepping stone towards all libraries being able to do so. By virtue of BLC navigating the many elements involved in implementing CDL as a consortium, with IMLS support BLC will provide the technology, workflows, and experience to pave the way for CDL adoption by all libraries.

Project Work Plan.*Background and Ongoing Work*

BLC has been working towards implementing consortial CDL since initiating its first working group on the subject in the fall of 2020. Since then, BLC has worked with vendors, consortia, and other library stakeholders to investigate paths forward and has developed a robust implementation plan for consortial CDL. This project will fund start-up costs associated with the full implementation of consortial CDL and provide funding to sustain BLC's CDL Program Manager for an additional 18-month period. During this time, the CDL Program Manager will promote the widespread adoption of CDL at scale through sustained engagement with libraries and consortia, advocacy with library technology vendors, and the production of free and open resources to guide others with their implementation efforts.

In September 2020, the BLC Board of Directors charged a CDL Working Group to investigate technology, scalability, and legal risks associated with CDL. The Working Group included BLC leadership and representatives from eleven member institutions. The group researched the national and global CDL landscape, engaged extensively across the BLC member community, and consulted with various external organizations working in the CDL space. The Working Group's recommendation to pursue the implementation of consortial CDL together with a \$100,000 contribution to accelerate CDL development with Project ReShare was approved by the Board in August 2021. The following month, a public report, "[Consortial CDL: Implementing Controlled Digital Lending as a Mechanism for Interlibrary Loan](#)," was released to share findings and recommendations and to engage and inform other libraries and consortia exploring CDL.

A subsequently convened CDL Steering Committee has worked for the past year to develop a collaboration with Project ReShare, guiding the development of CDL technology within the ReShare resource sharing platform and mapping the consortium's overall CDL implementation. In parallel, BLC leadership has worked diligently to broaden the coalition of libraries and consortia planning to implement CDL and align their efforts along BLC's development path and aspirations.

In November 2021, BLC was awarded a \$215,000 grant from the Davis Educational Foundation to sustain early phases of this project, leading to the Early Adopter Program taking flight in the summer of 2023. This grant held great significance beyond BLC as the largest award for a CDL-related project at that time, sending a strong signal to other libraries, consortia, and vendors that an interoperable CDL solution developed collaboratively by and for libraries and consortia is within reach. That early support and BLC's engagement with the ReShare community helped catalyze two additional \$100,000 matching contributions from the Midwest Collaborative for Library Services and Duke University. With BLC's initial \$100,000 contribution, the combined \$300,000 investment in ReShare CDL amply supports the development of a minimum viable product in summer 2023 and provides significant resources to heighten our collective ambition in future development phases.

In March 2022, the Executive Committee for Project ReShare approved a proposal submitted by BLC to establish the ReShare CDL Working Group, a committee responsible for articulating the roadmap for ReShare CDL functionality and overseeing the development of the ReShare CDL product through the launch of a minimum viable product. Membership in the ReShare CDL Working Group included three members of BLC's CDL Steering Committee, three representatives from other Project ReShare community members, and representatives from Project ReShare commercial development partners (Index Data and Knowledge Integration). The Group was chaired by BLC's Executive Director, the project director for this project. The CDL Working Group met several times throughout the summer of 2022, including a 5-day virtual

design sprint led by Kendall Fortney, the VERSO Program Director at the University of Vermont (a BLC member).

The anticipated CDL functionality builds upon the existing ReShare Returnables client, adding new functionality that enhances workflow and user experience for both physical and digital returnables and positions ReShare for future lending of non-returnables.

The CDL Working Group articulated a three-phase development roadmap:

- **Phase I: Minimum Viable Product (MVP) to establish a basic request model and patron interface**
 - Build on ReShare policy models / ILS integration / staff workflows
 - Integration with ReShare's consortial discovery interface (VuFind)
 - Integration with ILLiad and other resource sharing systems
 - Provide Patron UI
 - Extend Request and Rota model with digital requests
 - Extend Supplying library UI with new request states and pull slips
 - Enable digital delivery
- **Phase II: Integration of Shared Repository Technologies**
 - Automatically check if a title has already been digitized
 - Policy-based automatic delivery or queue for digitization
- **Phase III: Enhanced Functionality and Refinements**
 - Patrons can renew their loans and 'return' early
 - Waitlist to manage demand for frequently borrowed materials
 - Closed stacks and dark archive support (to bypass awaiting shelf availability check and return to shelf components of workflow)
 - Additional policy controls at the library and consortial levels

In September 2022, Index Data led discussions with the ReShare development team to determine resource requirements and timelines. Development of the MVP is projected to take 24 weeks at an estimated cost of \$135,630. BLC presented the final roadmap, resource requirements, and timelines to the ReShare community in October 2022 for approval. Development commenced soon after, with expected go-live in June 2023.

CDL Early Adopter Program (EAP) - June 2023 to December 2023

The EAP will launch for a cohort of 4-6 BLC member institutions in the summer of 2023. Participants will help refine workflow processes, inform patron demand, and position BLC for consortium-wide implementation in 2024 as part of this proposed IMLS project.

EAP participants must implement ReShare CDL and the shared repository, both of which are hosted solutions. Implementation of ReShare CDL will include a holdings upload process and learning the workflows of the software, which are modeled on those of existing interlibrary loan processes.

BLC is pursuing a digitization hub model for the EAP, using BLC's existing consortial delivery service to physically ship requested materials for scanning at a centralized location. This approach will minimize the scanning volume for participants, help estimate the scanning needs for a full CDL program, and determine the best way to meet those needs in the long term. No specific scanning hardware is required for EAP participants. Because libraries are well-versed in mailing items between institutions, we expect this step in the CDL loan process to align well with existing workflows.

External funding provided by the Davis Educational Foundation will subsidize direct costs related to implementation activities for EAP participants. The CDL Steering Committee will establish a long-term funding model for ongoing maintenance and future implementation by additional BLC member institutions.

As part of BLC's external engagement strategy, the project team will produce a report on early lessons from the EAP and seek to present our observations and recommendations at the fall 2023 CNI membership meeting. A one-year review will follow in the fall of 2024.

Full Implementation - various, commencing December 2023

Throughout the project, BLC anticipates supporting four implementation windows for additional libraries to implement Project ReShare to facilitate CDL. Given the significant commitment to implementing new library technologies, these windows are scheduled to align with the typical academic calendar: winter 2023/24, summer 2024, winter 2024/25, and summer 2025. A subsequent assessment and evaluation period accompany each implementation window to improve the implementation experience for future cohorts.

The assessment will pay particular attention to the staff workflow and workload experiences and evaluate how patrons respond to the new CDL service. The assessment results will position BLC, Index Data, and the Project ReShare membership community to prioritize new and enhanced functionalities to incorporate into the ReShare codebase in subsequent, iterative development phases. The results will also inform whether or not BLC's intended scanning hub model employed in the EAP will scale. Special consideration will be given to the accessibility of digital assets and the overall patron experience, as described in the Performance Measurement Plan in this proposal.

Consortial CDL Toolkit - February 2024 to July 2024

As BLC gains experience implementing ReShare with additional cohorts of libraries, the project team will produce a Consortial CDL Toolkit to help guide other libraries and consortia considering implementing ReShare and scaling the rate of adoption. The Toolkit will be informed by the experiences of EAP participants and libraries in the first full implementation cohort and refined with input sought from other consortia at a conference workshop anticipated at the spring 2024 meeting of the International Coalition of Library Consortia (ICOLC).

The Toolkit will be freely distributed and openly available on the web. IMLS funding will support travel and workshops to share the Toolkit and associated materials with interested libraries and consortia throughout the project.

CDL Summit - November 2024 to April 2025

To ensure the broadest possible dissemination, BLC will seek to convene a national audience in a hybrid setting in spring 2025 as part of a two-day CDL Summit. This Summit will unite a diverse group of libraries, consortia, vendors, developers, and publishers to discuss future directions and strategies to scale adoption.

Updating the Toolkit and a CDL Retrospective - May 2025 to July 2025

In the final stages of the project, the project team will refine the CDL Toolkit drawing upon the experiences of later implementation cohorts, and produce a retrospective report assessing the project's overall impact and performance.

CDL Program Manager

Central to the success of this project is IMLS funding to sustain BLC's CDL Program Manager position for an additional 18 months beyond BLC's Early Adopter Program. Upon the successful completion of the EAP, the CDL Program Manager will lead ongoing implementation activities for additional cohorts of libraries and sustain external engagement with the broader library and information community by producing a Consortial CDL Toolkit and other related deliverables.

As of this submission, BLC is actively interviewing candidates fill this vacant position. The full position specification describing the qualities, range of experience, and education necessary to successfully implement and complete the project activities is included in this proposal's *Resumes of Key Project Staff and Consultants* section.

Broadly, the CDL Program Manager's overall responsibilities shall be coordinating the implementation of CDL-for-ILL for BLC members through a wide range of activities with both individual libraries and external partners and extensive external engagement to scale implementation and adoption by libraries and consortia nationwide after that.

Heads of Resource Sharing (HRS) Committee

The Heads of Resource Sharing (HRS) Committee oversees the BLC's interlibrary loan service and recommends mechanisms to the BLC Board of Directors to enhance resource sharing services among the member libraries. The HRS Committee undertakes initiatives on its own, in cooperation with other BLC Communities, or at the request of the BLC Board of Directors. Following the conclusion of the EAP, the HRS Committee shall assume responsibility and oversight of BLC's CDL program from the CDL Steering Committee.

The BLC Board of Directors appoints members of the Committee based on their expertise and their role as 'head' of resource sharing within their institution. All 26 member institutions are represented on the Committee, with the Executive Director acting ex-officio.

Diversity Plan.

This project will foster diversity in two complementary ways: firstly, by ensuring that libraries of all types and sizes have equitable access to CDL functionality, and secondly, by facilitating CDL as a library practice that can benefit patrons who aren't served by location-bound physical collections. This benefit applies to libraries of all types – including academic and public libraries with patrons drawn from large geographic regions.

Engagement with all resource-sharing technology vendors to ensure that they incorporate CDL functionality based on defined interoperability standards will cultivate a resource-sharing ecosystem in which all libraries are positioned to offer CDL functionality to their patrons. Physical collections alone cannot fully serve patrons with geographic constraints, print disabilities, and other specific needs. Interoperable CDL technology will enable equitable access to library materials in formats that best meet the needs of all patrons. BLC's collaborative approach to implementation with the library and consortial community will help ensure this outcome.

BLC also strives to recognize and celebrate the value of diversity in its hiring practices and is committed to advancing equity, diversity, inclusion, and antiracism work, as demonstrated through BLC's Equity, Diversity, and Inclusion Community of Interest and Human Resources Community of Practice. The project will engage institutions and participants representing historically underserved populations and directly engage diverse library staff, faculty, and

students. Specifically, this project will draw upon the expertise and experiences of BLC's Equity, Diversity, and Inclusion Community of Interest members and its BIPOC and LGBTQIA+ Caucuses in performance measurement and assessment activities wherever possible. The two Caucuses are open to underrepresented library workers and LIS students (at any level) identifying as Black, Indigenous, and People of Color (BIPOC), and/or Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, Intersex, and Asexual/Aromantic/Agender (LGBTQIA+) and do not need to be affiliated with a BLC member institution.

BLC is an equal opportunity/affirmative action employer and welcomes applicants from diverse backgrounds. BLC recognizes the value of skills and knowledge gained outside formal higher education and paid employment. Applicants presenting other qualifications or experience equivalent to those required are considered and encouraged to apply to jobs at BLC.

Project Results.

The most important result of this project to highlight is the most impactful: improving and promoting access to library collections for students, faculty, and scholars in furtherance of NLG Goal 3 Objective 3.2.

Improved access to collections for teaching and learning. By facilitating both BLC's CDL-for-ILL activities and that of libraries nationwide, this project will result in improved access to collections for teaching and learning for all patrons. Enabling as many libraries as possible to engage in CDL-for-ILL will mean that patrons can access more materials than they can now, in a format that best meets their needs, directly supporting and enriching their teaching and learning. Overcoming existing resource sharing systems' limited ability to share items in digital formats will mean that patrons who are unable to access physical resources for any reason will now have digital access to that same content; that rare and delicate items in libraries' and museums' special collections that can be lent under only the strictest physical settings can now be lent digitally to patrons anywhere; and that patrons can receive items digitally in a fraction of the time it would take the physical item to arrive (particularly once an item has been digitized and contributed to the shared repository). For all of these reasons, CDL-for-ILL facilitates improved, equitable access to library collections, improved teaching and learning outcomes, and BLC's project, which is aimed at developing the tools for all libraries to implement CDL, will be a critical part of making this impact possible.

In parallel, this project will address the challenges involved with CDL. The ability to implement CDL is limited by the available technologies, legal uncertainties, and the complexities of determining optimal workflows and staffing solutions. BLC's CDL project will produce solutions to all three of these challenges.

New interoperable technologies. As of this writing, no technology solutions exist for libraries to implement CDL-for-ILL. To remedy this, BLC has partnered with Project ReShare and IndexData to create ReShare CDL, a module for the existing ReShare resource sharing software that will facilitate both consortial and local CDL services. ReShare CDL is explicitly designed on the existing workflows and service models for interlibrary loans, thereby taking advantage of an existing software base in Reshare itself and an existing knowledge base in the wealth of practitioners actively engaged in this space. This development partnership will result in an interoperable technology solution available in summer 2023 that will enable libraries and consortia to conduct CDL-for-ILL.

In parallel, BLC has collaborated with other vendors in the resource sharing sphere (including OCLC, Atlas Systems, and Ex Libris) to develop CDL functionalities within their existing resource sharing products. This advocacy focuses on the tools libraries use to manage resource sharing requests (e.g., ILLiad, Rapido, and Tipasa) and the systems that transmit requests between libraries (e.g., OCLC Worldshare ILL and RapidILL). BLC and other libraries, consortia, and allied organizations advocate for interoperable CDL solutions that conform to industry standards and are integrated into existing resource sharing solutions. Several such consortia and allied organizations have provided letters of support for this project and are included in the *Supporting Documents* section. BLC's executive director, the project director for this project, participates in the National Information Standards Organization (NISO) Interoperable System of Controlled Digital Lending (IS-CDL) Working Group. The NISO IS-CDL Working Group will develop a consensus framework in support of CDL of book content by libraries, to be published as a NISO Recommended Practice in 2023.

Risk mitigation & copyright best practices. A range of legal uncertainties exist around CDL beyond the single question of the legality of sharing digitized copies of in-copyright print items. Legal questions exist around how libraries implement CDL, the nature of the usage constraints that must be applied, and other considerations. In its implementation of CDL, BLC intends to preempt concerns from authors and publishers by demonstrating libraries' continued good-faith efforts to respect copyright. Constraints suggested in the literature around CDL include the acquisition of ebooks rather than the lending of digital surrogates via CDL whenever feasible, the use of digital rights management (DRM) to prevent redistribution of loaned items, maintaining an owned-to-loaned ratio so that the print book is not loaned while the digital version is circulating and vice versa, and concentrating CDL efforts on older or out-of-print materials. BLC's CDL project will engage with legal questions as they arise, consulting with independent legal scholars, institutions' general counsels, the consortium's legal counsel, and other experts. BLC will share its experiences and recommendations in this area in the Consortial CDL Toolkit that will be released in the summer of 2024 as part of its broader advocacy efforts. In parallel, BLC will use many opportunities to present at conferences and engage directly with library consortia to share these experiences and lessons learned.

Workflows and staffing solutions. These are critical elements of a CDL implementation due to the unpredictable volume of digitization to fulfill patron requests and the labor-intensive nature of digitizing whole books. With twenty-six member institutions, BLC will serve as a laboratory where workflow and staffing models can be piloted, with the most effective being extended to all BLC members. Through conferences (e.g., Coalition for Networked Information, International Coalition of Library Consortia, and others), the publication of the Consortial CDL Toolkit, and direct engagement with library consortia, BLC will share with other libraries and consortia the knowledge it has gained about staffing and workflow models. As with any new initiative, knowing what has (and has not) worked for another library helps to ensure that new library implementations maximize efficiency and efficacy.

Statement of National Impact.

Since its inception, BLC's CDL implementation has been designed to have a national impact. Through the consortium's work with resource sharing vendors and service providers (e.g., OCLC, Ex Libris, and Project ReShare) and library partners engaged in this area (e.g., Library Futures, CDL Implementers Forum, Consortial Approaches to CDL, and the many consortia we have partnered with), BLC has sought to shape the national development of and conversations about CDL. BLC has inspired additional libraries and consortia to contribute financial and in-kind support to Project ReShare. It has catalyzed OCLC's nascent efforts to build CDL into its

resource-sharing solutions. BLC's CDL implementation will continue to have a national impact through three very concrete outcomes that the project will deliver: (1) an actual instantiation of consortial CDL; (2) the production of the first software to support consortial CDL; and (3) a CDL implementers' toolkit and related guidance designed to facilitate libraries' and consortia's efforts to move forward with their own CDL implementations.

1. The first implementation of consortial CDL

In the summer of 2023, BLC will be the first library consortium to implement consortial CDL, a project culminating several years of effective collaboration. Given the time it has taken and the level of work involved, it is not surprising that no other consortium has yet implemented CDL.

And yet, it is this very fact that makes BLC's implementation so critically impactful to libraries and consortia nationwide. With their implementation, BLC will have demonstrated that consortial CDL is possible and paved the way for other library consortia to do the same. As BLC's implementation evolves and improves over time, so will the opportunities opened up for other library consortia to follow the same path and implement CDL on their own. Over time, BLC's initial implementation of CDL will lead to a network of libraries and consortia having implemented CDL, thereby creating the opportunity for libraries to conduct CDL collectively by linking consortial and individual implementations.

All of this stems from BLC, having paved the way, lit the spark, so to speak, by launching the first actual instantiation of consortial CDL.

2. Software to support consortial CDL

The main limiter on BLC's efforts to move ahead with consortial CDL has been the lack of a software solution to support this service. In response, BLC has partnered with Project ReShare to create the necessary software. Project ReShare is a hosted, open-source, community-governed resource sharing software implemented by several library consortia whose ranks of participating and member libraries have grown considerably in recent years.

The software produced through the partnership between the BLC and Project ReShare will be available for other libraries and consortia who are interested in implementing consortial CDL. Once again, BLC's pioneering efforts in this area will pave the way for other libraries and consortia to follow BLC's lead.

3. Sharing the knowledge and best practices for consortial CDL

A key intention underlying BLC's push to implement consortial CDL has been the goal of enabling other libraries to do the same. BLC is doing this by demonstrating the potential for consortial CDL through our implementation and helping to direct software development. A third will be the BLC's broad-based efforts to share what we have learned and to provide guidance and information to other consortia seeking to follow the same path.

As part of its implementation, the BLC will create and disseminate a Consortial CDL Toolkit containing practical guidance to help libraries implement consortial CDL. In parallel, BLC will take every opportunity to reach out to libraries through conference presentations, professional development opportunities, and publishing. The BLC's CDL Program Manager will mentor other libraries and consortia implementing CDL, regularly

engaging with partners to advise their efforts and offering collaborative support for their CDL implementations.

In these three ways, BLC will make the fruits of our implementation readily available to libraries nationwide. The impact of BLC's consortial CDL implementation will be felt nationally as we make the tools and knowledge available to implement CDL. We demonstrate the potential inherent in a consortial CDL implementation through our implementation.

This nationwide impact will be significant even if CDL is initially deemed not to be a legal means of sharing resources. In that event, all the technologies, workflows, etc., will still be entirely applicable to use cases where libraries can only share physical materials digitally and where constraints on that sharing are required. An example would be rare, unique, and fragile materials from libraries' and museums' special collections. The same technical and workflow infrastructure that supports CDL for in-copyright print materials applies equally well to distinctive collections. This project's outcomes will benefit the library and archives community even if the federal courts limit the extent to which CDL can be implemented.

Supporting Documents

Letters of Support

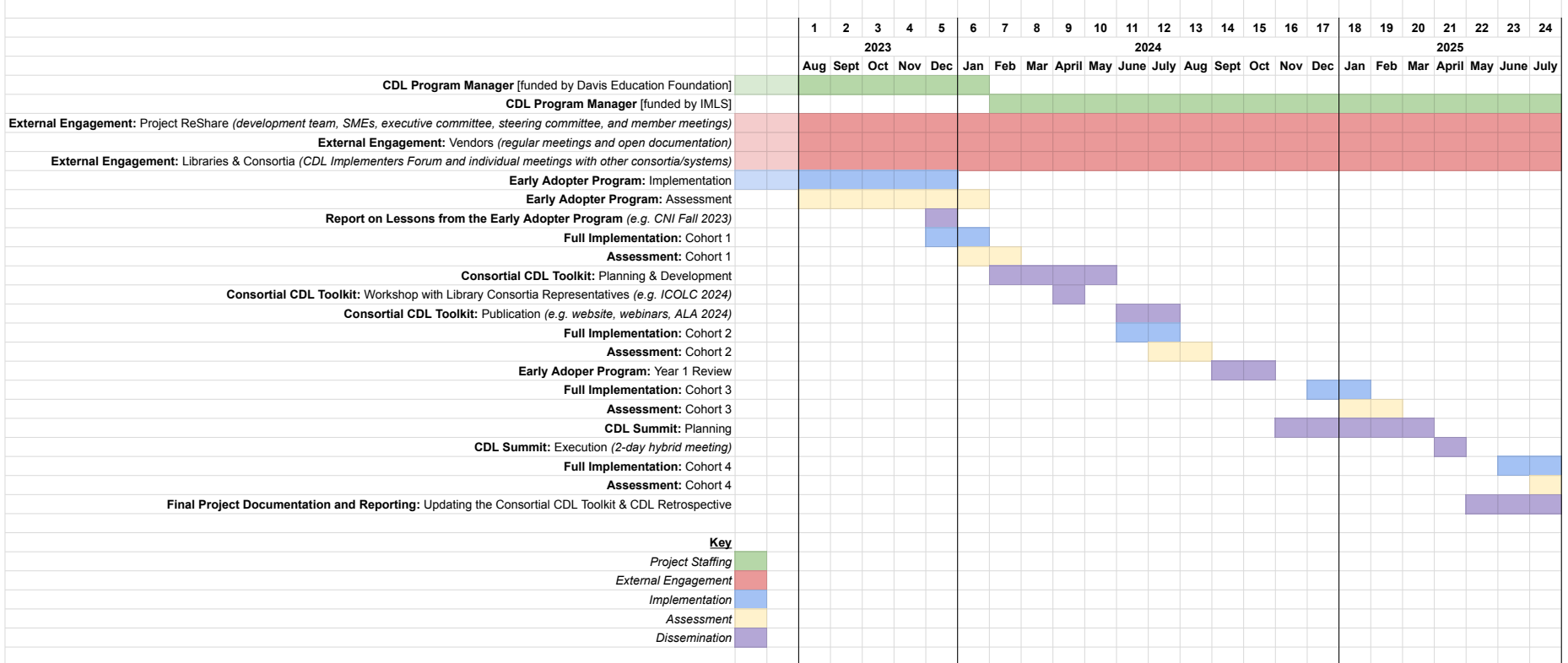
- (1) National Information Standards Organization (NISO) [*Supportingdoc1.pdf*]
- (2) Ex Libris, part of Clarivate [*Supportingdoc2.pdf*]
- (3) Library Futures [*Supportingdoc3.pdf*]
- (4) CDL Co-Op [*Supportingdoc4.pdf*]
- (5) Project ReShare [*Supportingdoc5.pdf*]
- (6) Partnership for Academic Library Collaboration and Innovation (PALCI) [*Supportingdoc6.pdf*]

Additional Documents

- (1) Consortial CDL: Implementing Controlled Digital Lending as a Mechanism for Interlibrary Loan (September 2021) [*Supportingdoc7.pdf*]
- (2) Award letters from the Davis Educational Foundation (November 2021; March 2023) [*Supportingdoc8.pdf*]
- (3) Project ReShare Welcomes Boston Library Consortium (December 2021) [*Supportingdoc9.pdf*]
- (4) Implementing Controlled Digital Lending at Scale: Insights from the Boston Library Consortium (most recent BLC presentation about the project at WNYLRC, March 2023) [*Supportingdoc10.pdf*]

Schedule of Completion

Boston Library Consortium, Inc.



Key

- █ Project Staffing
- █ External Engagement
- █ Implementation
- █ Assessment
- █ Dissemination

Digital Products Plan

BLC's consortial CDL program includes the development of an open source software solution to facilitate CDL transactions for interlibrary loan purposes in collaboration with the broader Project ReShare community. CDL necessarily involves the digitization of physical books and the creation of digital assets to facilitate these transactions. However, IMLS funding will not be used to support the costs associated with the creation of these digital assets or direct costs associated with the development of the software solution. Instead, IMLS funding will be used to create and disseminate openly-available digital products including the Consortial CDL Toolkit, assessment reports, and any documentation presented at conferences and meetings throughout the project period. These materials are intended to help guide other libraries and consortia considering implementing CDL for interlibrary loan. IMLS funding will support both the creation of the toolkit as well as travel and workshops to share the toolkit and associated resources with the broader library and information community throughout the project period.

Open Source Software

BLC partnered with Project ReShare to provide functional requirements and leadership in the design of a roadmap to develop an open source software solution and the infrastructure required to implement and maintain CDL infrastructure across BLC's member institutions.

Project ReShare software and code is publicly available under the Apache License 2.0, a permissive free software license that permits and protects unlimited use, modification, and re-distribution of the software and related code base. The ReShare community is sustained by direct financial contributions as well as significant in-kind time and expertise sustain, maintain, and accelerate future development activities from libraries, consortia, and commercial partners.

Project ReShare uses a community governance model, with representatives from across the ReShare membership including libraries, consortia, software developers, and open source advocates. The Executive Committee and Steering Committee lead the overall work and roadmap in partnership with the Development Team, Product Management Team, and several Subject Matter Expert Teams. Together, these groups manage software development and incorporate community contributions into the source code on an ongoing basis. Documentation and code is available on GitHub, enabling any individual or organization to use, maintain, and modify the software according to their local needs.

Development of Project ReShare has focused on standards compliance and interoperability. ReShare Returnables was the first consortial implementation of the ISO 18626 protocol for interlibrary loan transactions, and use of this standard provisions positions the ReShare system for seamless communication with other protocol-compliant systems. ReShare Returnables also takes advantage of the NCIP and Z39.50 standards supported by many local library management systems to create local integrations and reduce duplicate workflows. ReShare CDL is equally committed to interoperability and standards compliance, and several members of the ReShare community and BLC membership are actively involved in NISO's Interoperable System for Controlled Digital Lending to help ensure this outcome (see *Supportingdoc1.pdf* for a letter of support from NISO). In future phases of development, functionality is expected to facilitate both consortial CDL for interlibrary loan as well as local CDL for course reserves and other local use cases. ReShare is using the Grails web application framework to develop the CDL solution, which is also open source, highly conventionalized, and well documented. These

characteristics create an environment to facilitate greater adoption and enables established protocols for security and data protection to be integrated into the development activities.

At the same time, BLC has worked regularly with library technology vendors to ensure that all resource sharing solutions interoperate and commit to integrations across multiple systems. A letter of support from Ex Libris is included in this proposal (*Supportingdoc2.pdf*).

Digital Surrogates of Print Materials

The digital assets created as part of BLC's CDL program will comprise digital surrogates of print books held in the library collections of BLC's member institutions. File formats may include TIFFs, PDFs, and EPUBs. Because these are digital surrogates of copyrighted materials, it would not be appropriate or permissible under US copyright law to make these digital products openly available. These digital assets are unlikely to pose privacy or cultural sensitivity concerns; however, any concerns that may arise will be addressed using approaches consistent with those adopted by HathiTrust. BLC will not assert exclusive rights to the digital assets or restrict the use of these digital assets beyond the controls required for lending digital copies of physical library books, in accordance with documented CDL principles consistent with US copyright law. These digital surrogates will be securely stored in a shared repository and may be accessed to facilitate digital interlibrary loans of sequestered print materials held by the libraries in BLC's network.

BLC will explore the possibility of contributing digital assets to HathiTrust or other established preservation repositories, provided this is deemed permissible by law and at the discretion of the individual libraries at BLC member institutions that own the print materials. BLC intends to adhere to the NISO Recommended Practice for Interoperable System for Controlled Digital Lending, which will define best practices for many aspects of this relatively new service model.

Consortial CDL Toolkit, Conference Presentations, CDL Summit Materials, Assessments, and Other Digital Products

Throughout the project period, the project team will produce a range of documents in support of the activities described in the Narrative and the Schedule of Completion.

All work products created using IMLS funds will be openly available, including the Consortial CDL Toolkit, assessment reports, and any documentation presented at conferences and meetings throughout the project period, including the CDL Summit.

BLC will make these work products available to the broader library and information community and the general public on our website (<https://blc.org>) and in additional open repositories, whenever possible. In order to promote the greatest possible use and distribution of digital products created using IMLS funds, BLC will apply Creative Commons licenses to work products whenever feasible. BLC will sustain these webpages beyond the grant period and will integrate CDL responsibilities into our core resource sharing programs (including traditional interlibrary loan, whole e-book interlibrary loan, consortial delivery service, extended delivery service, etc.)

Organizational Profile

The Boston Library Consortium, Inc. (BLC) was founded in 1970 by the chief librarians of Boston College, Boston University, Brandeis University, Tufts University, and the Boston Public Library. At that time, BLC served to promote cooperation among the members in building their research resources, thereby avoiding unnecessary duplications, and to make more readily available their existing collections to their several consistencies. The original impetus for the founding of the Consortium came from a suggestion of the graduate deans of the four schools involved, who themselves were exploring possibilities of cooperative efforts in their graduate programs. The graduate deans and chief librarians began meeting to explore cooperative opportunities for the libraries in March 1959.

BLC was incorporated in the Commonwealth of Massachusetts in 1977 (*Articles of Organization dated April 28, 1977, approved by the Secretary of the Commonwealth*). At that time, members included the Trustees of Boston College, Trustees of the Public Library of the City of Boston, Trustees of Boston University, Brandeis University, Massachusetts Institute of Technology, Northeastern University, Trustees of Tufts College, University of Massachusetts, and Wellesley College. "It is the purpose of the Boston Library Consortium to share human and information resources so that the collective strengths support and advance the research and learning of the members' constituents" (*BLC Bylaws, Article II, Section 1*). Today, the BLC members collaborate to deliver innovative and cost-effective sharing of print and digital content, professional development initiatives, and projects across a wide range of library practice areas.

As of 2023, BLC's membership includes twenty-six institutions including public and private universities, liberal arts colleges, state libraries, special research libraries and public libraries. Together, BLC's members serve more than 500,000 students, faculty, and scholars in the northeastern United States. Members include: Bentley University (Waltham, MA), Boston College, (Newton, MA), Boston Public Library (Boston, MA), Boston University (Boston, MA), Brandeis University (Waltham, MA), Connecticut College (New London, CT), Marine Biological Laboratory and Woods Hole Oceanographic Institution (Woods Hole, MA), Middlebury College (Middlebury, VT), Northeastern University (Boston, MA), State Library of Massachusetts (Boston, MA), Trinity College (Hartford, CT), Tufts University (Medford, MA), University of Connecticut (Storrs, CT), University of Hartford (Hartford, CT), University of Massachusetts - Amherst (Amherst, MA), University of Massachusetts - Boston (Boston, MA), University of Massachusetts - Chan Medical School (Worcester, MA), University of Massachusetts - Dartmouth (North Dartmouth, MA), University of Massachusetts - Lowell (Lowell, MA), University of New Hampshire (Durham, NH), University of Rhode Island (Kingston, RI), University of Vermont (Burlington, VT), Wellesley College (Wellesley, MA), Wesleyan University (Middletown, CT), and Williams College (Williamstown, MA). The Internet Archive (San Francisco, CA) is an affiliate member.

BLC is a 501(c)(3) corporation governed by a Board of Directors including representation from the chief librarian for each of the member institutions. The Board meets quarterly and maintains three committees: the Executive Committee, the Finance Committee, and the Governance Committee.

BLC is staffed by 5 full-time employees: the executive director, the program manager for learning and development, the systems manager, the CDL program manager, and the executive assistant/membership coordinator. Much of the work of BLC is done through its membership Communities. The BLC Communities include representation from across the BLC member institutions and range from groups involved in a specific initiative or project to those focused primarily on networking and sharing experiences with colleagues.