

Project Justification.

The Boston Library Consortium (BLC) is requesting \$249,744.50 for a two-year implementation grant addressing NLG-L Goal 3 and Objective 3.3 to scale the implementation of a solution that enables controlled digital lending (CDL) as a mechanism for interlibrary loan (ILL) for libraries and library consortia nationwide.

No technologies yet exist for libraries to implement consortial CDL, an impactful practice whereby libraries may lend legally-acquired print materials in a digital format. As a result, the development of an interoperable technology solution to facilitate CDL meets the broad and urgent need identified by the library community, described in the '[Statement on Using Controlled Digital Lending as a Mechanism for Interlibrary Loan](#)' (CDL Co-Op, 2021). Through CDL, libraries can improve equity of access to collections by enabling patrons to obtain digital access to items otherwise available only in print. This practice aligns with the rights afforded to libraries for ILL, a core library practice long empowered by copyright law and protected by Congress.

Publishers increasingly refuse to sell or license content to libraries ([SCONUL, 2021](#)), thereby preventing them from making ebooks available to their users. This lack of digital access can undermine research productivity and learning outcomes and can be a barrier to access for patrons who are unable to access physical collections for any number of reasons. CDL directly addresses this issue by ensuring that equitable access is possible for all library users by giving them access to the format that best meets their needs.

By transforming the ways patrons access physical collections, consortial CDL is a value multiplier for library consortia nationwide, amplifying the benefits of engaging in CDL locally. BLC's vision is for all patrons to access the consortium's collective collections in the format of their choice. Together, BLC's members serve more than 300,000 students, faculty, and scholars, plus the residents of the Commonwealth of Massachusetts. BLC's consortial CDL implementation will produce open technologies, workflows, and shared experiences to support broader uptake of CDL for all libraries and consortia.

CDL will also make resource sharing more environmentally sustainable by reducing the financial and environmental costs of mailing books between libraries. And lastly, CDL will facilitate the preservation of and long-term access to collections by providing digital access to materials that are unsuitable for shipping. This is particularly important for print materials committed to shared print programs.

Project Work Plan.

BLC is collaborating with Project ReShare on the development of an open source, community-governed resource sharing solution that will support consortial CDL based on [interoperability standards](#). In parallel, BLC is engaged with the principal vendors in this space, OCLC and Ex Libris, to ensure that their CDL-related developments are also based on standards for interoperability. These efforts will result in support for CDL throughout the nation's resource sharing infrastructure—and a CDL solution that is within reach of every library.

Phases I and II of BLC's CDL project involved identifying, developing, and launching a pilot of consortial CDL technology. IMLS funds will support Phases III and IV of BLC's implementation plan, which consists of launching CDL consortium-wide, expanding partnerships with other libraries and consortia, and working with OCLC and Ex Libris to facilitate interoperable CDL services for all libraries. BLC's [CDL Steering Committee](#), a group of library and information professionals overseeing BLC's ongoing CDL efforts, will lead the project.

During Phase III, BLC will expand its CDL implementation to include the remaining members' libraries, likely being the first consortium to implement CDL and the first to engage in interlibrary CDL. In Phase IV, BLC will work with partners to ensure that libraries nationwide can implement CDL using the resource sharing technology of their choice. This will include collaborations with OCLC and Ex Libris, partnering with other library consortia to support their CDL implementations, and outreach to the library community through presentations, consultations, and written output.

Central to the success of this project is the IMLS-funded CDL Program Manager, who will plan, execute, and manage all project activities, including the full consortial implementation during Phase III, and play a leading

role in advocacy and outreach during Phase IV. BLC will seek to fill this role by October 1, 2023, to strengthen the capacity of the CDL Steering Committee and accelerate development and implementation activities to ensure that CDL is a practice that all libraries may engage in.

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 are not well-served by physical collections. This benefit applies to libraries of all types—including academic libraries and public libraries with patrons across large geographic regions. Physical collections alone cannot fully serve patrons with geographic constraints, print disabilities, and other specific needs. Interoperable CDL technology available to all libraries 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.

Project Results.

This project will produce two principal outcomes to move the library field forward in implementing CDL.

Consortial Model

BLC contains a diverse range of institutions in terms of sizes, types, and technology infrastructures. To support this diversity, BLC relies on the interoperability of the many technologies it uses and is an outspoken proponent of interoperability standards such as ISO 18626. As a result, the consortial CDL implementation and tools pioneered by BLC will effectively serve as a model for other libraries and consortia of all types. And BLC’s emphasis on interoperability will lead to the development of solutions that meet the needs of nearly all libraries and consortia, whether using shared systems or not.

Tools and Technologies

BLC is committed to sharing all of the CDL-related assets it creates to facilitate other libraries’ and consortia’s implementation of CDL. This will include all of the policies, standards, and workflows developed to support the consortium’s CDL practices and the software created by Project ReShare, which will be available to all other libraries and will work interoperably with existing resource sharing solutions.

Statement of National Impact.

As noted in the *Project Results*, the collaborative and interoperable nature of this project and the technologies it leads to, alongside other library consortia, partners, vendors, and stakeholders, will ensure that its impact is immediately broader than the BLC alone.

Over the past two years, BLC has assumed a leadership role in the CDL space through sustained engagement in various forums, including [CDL Implementers](#), [Consortial Approaches to CDL](#), the [Ex Libris CDL Advisory Group](#), the [NISO Working Group](#), [Library Futures](#), and the [CDL Co-Op](#), as well as with existing vendors such as OCLC and Ex Libris. Throughout this project, the CDL Steering Committee has engaged with these communities to build a shared understanding of CDL for resource sharing and seeking support for developing an interoperable consortial CDL solution that is responsive to the needs of libraries and consortia nationwide.

The BLC Board of Directors committed \$100,000 in 2021-22 (Phase I) to accelerate the implementation of consortial CDL and catalyze investments from other library consortia, strategic partners, and external funders. Others have since committed funds, including a \$100,000 investment from the Midwest Collaborative for Library Services and extensive in-kind support of development activities from several Project ReShare community members. This growing national interest will advance the vision for CDL as a core resource sharing practice.

Budget Summary. The total project cost is \$249,744.50, inclusive of indirect costs. Project costs include \$170,495 in staffing costs, \$30,000 for Project ReShare membership fees, \$27,000 in travel and workshop expenses, plus \$22,249.50 indirect costs.