A peek into the future: Controlled Digital Lending in libraries

Judith Fraenkel, September 2022

IGELU Conference
12th –15th September 2022

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Digital Innovations

"Digital innovations are more of a human science than computer science"

Lettie Y. Conrad

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Taken from:
https://scholarlykitchen.sspnet.org/2021/07/14/title-digital-transformation-requires-cultural-evolution/

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What is Controlled Digital Lending?

Controlled Digital Lending enables a library to circulate a digitized title in place of a physical one in a controlled manner. Principles:

- "owned-to-loaned" ratio
  - Circulate exact number of copies of a specific title the library owns
  - Prevent users from redistributing
- Mimic restraints on physical material – for example, one reader at a time

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Controlled Digital Lending

Controlled Digital Lending by Libraries — Position Statement · White Paper · ILL Statement · FAQ · Further Reading

Read
Move to Bookshelf ▶
Item Info
Show File in Finder
Return Borrowed Item
Remove from Bookshelf
Remove from Library

Controlled Digital Lending (CDL) is an emerging method that allows libraries to loan print books to digital patrons in a "lend like print" fashion. Through CDL, libraries use technical controls to ensure a consistent "owned-to-loaned" ratio, meaning the library circulates the exact number of copies of a specific title it owns, regardless of format, putting controls in place to prevent users from redistributing or copying the digitized version. When CDL is appropriately tailored to reflect print book market conditions and controls are properly implemented, CDL may be permissible under existing copyright law. CDL is not intended to act as a substitute for existing electronic licensing services offered by publishers. Indeed, one significant advantage of CDL is addressing the "Twentieth Century Problem" of older books still under copyright but unlikely ever to be offered digitally by commercial services.

https://controlleddigitallending.org/

IFLA Statement

International Federation of Library Associations and Institutions

WHO WE ARE   WHAT WE DO   NEWS   EVENTS

You are here: Home › News › IFLA releases a statement on Controlled Digital Lending

IFLA releases a statement on Controlled Digital Lending
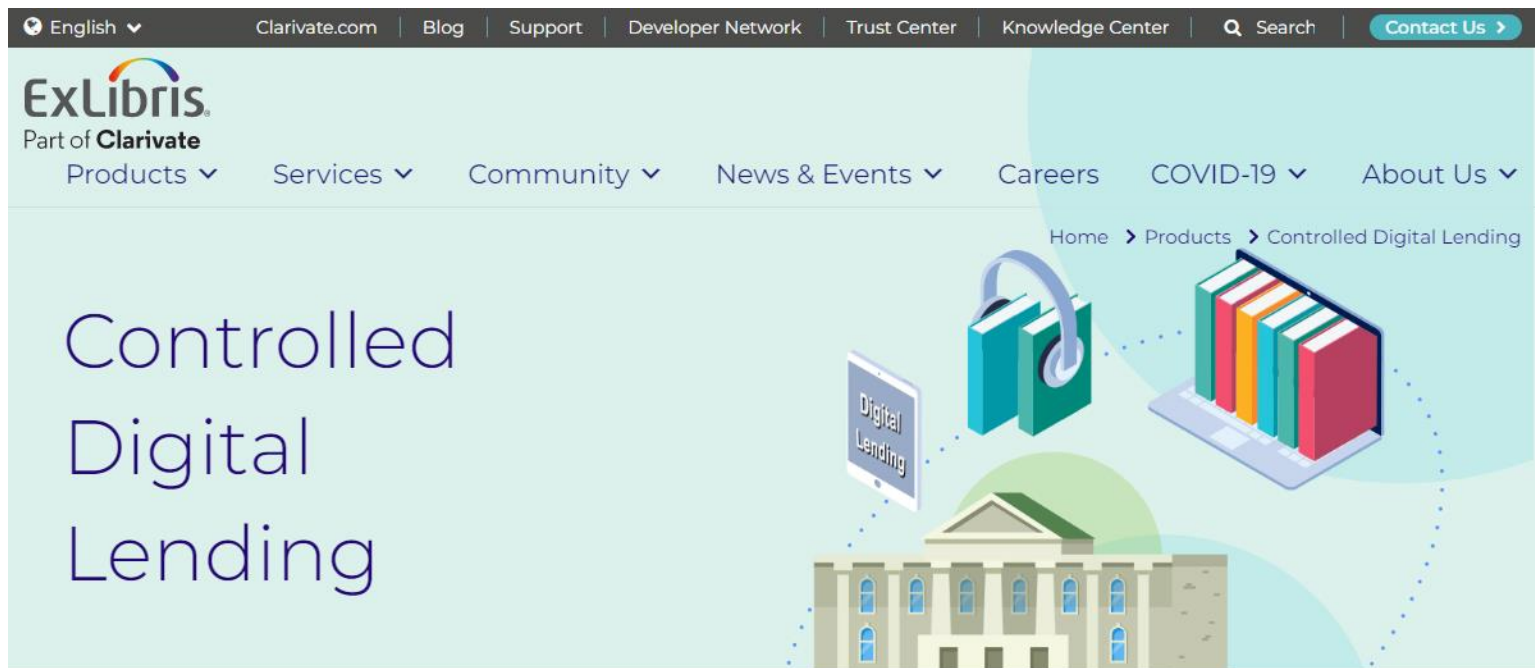
16 June 2021

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CDL – Why do academic libraries need it?

- Make it possible for libraries to fulfill their "vital function in society" by providing easy online **access to learning & research** material

- **Digital aides** for readers with print disabilities, research efficiency needs and more

- The "Twentieth Century Problem" - older books still under copyright but **unlikely ever to be offered digitally** by commercial services

- **Additional**:
  - Quick lending turnaround
  - Print conservation
  - Ecological awareness – saving shipments for resource sharing

CDL as a Service

CDL Focus Areas

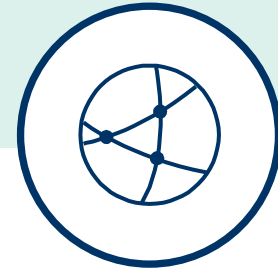### Course Resources – Alma D

- Short term access
- Patron waitlist management

Available Now!

General Circulation – Alma

- Long term lending
- Sync digital / physical fulfillment

Inter Library Loan (ILL) – Rapido

- Consortia
- Single institutions
- ISO ILL for CDL conformance

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CDL for Course Resources

- Limit number of **concurrent users** according to number of items on shelf

- Limit viewing session to X hours

- Enable **patron waitlist** for digital resources

- Any viewer, any discovery layer – Primo, Leganto etc

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Long-term Loans – Roadmap Plans

- Long term loans with CDL copy

- Integrate with physical circulation / fulfilment flows (including Terms of Use)

- Sync physical and digital fulfillment, maintaining own-to-loan ratio

- Leverage Alma as a unified resource management system

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Resource Sharing – Roadmap Plans

- Enable libraries to share CDL resources

- Ensuring the physical copy cannot be circulated until the CDL copy is "returned" and maintaining the own-to-loan ratio

- Offering patrons visibility upon discovery of CDL available options

- Conformance with ILL CDL

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CDL General Areas of Work

Copyright
- Own-to-loan ratio
- Prevent redistribution
- Exempt specific user groups from CDL
- Other: Advanced copyright statement management; Watermarks

Fulfillment
- Limit session period
- Waiting list
- Any viewer, any discovery layer – Primo, Leganto etc.
- Other: Closed captions / subtitles for patron accessibility
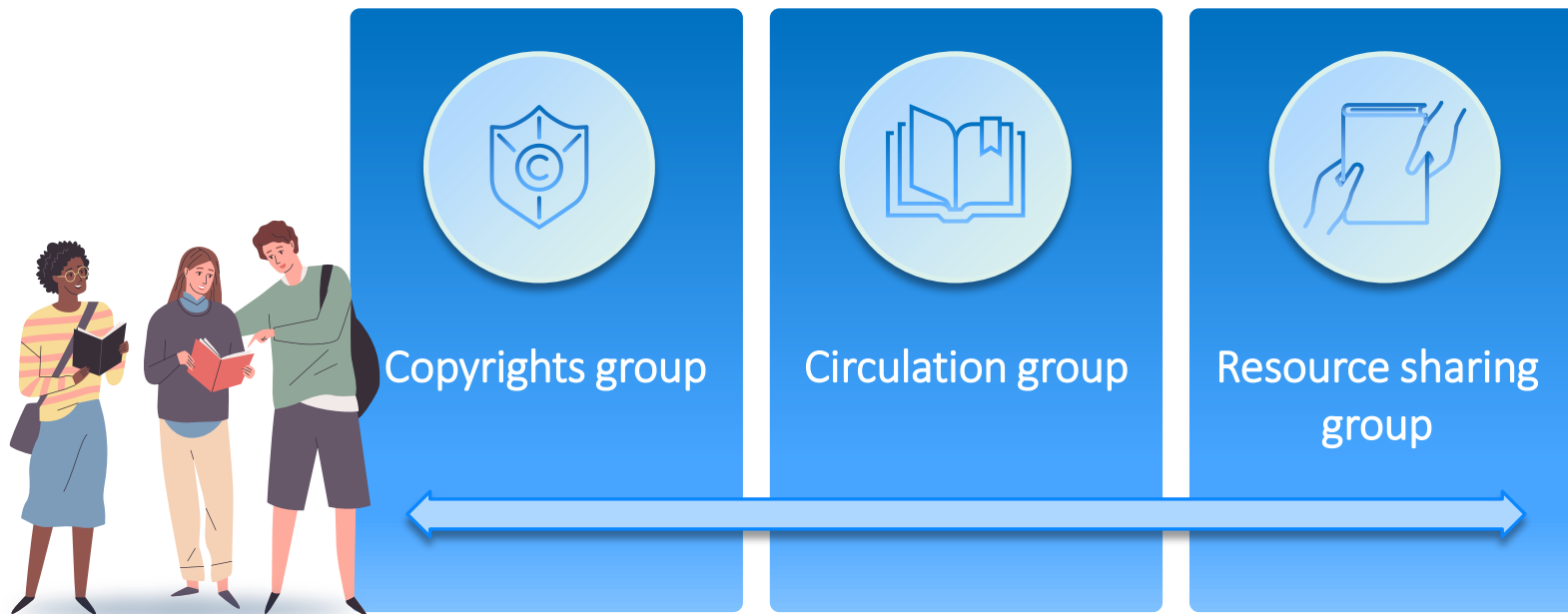
Administration
- Waitlist control
- Analytics:
  - Average waiting time per resource
  - Early returns

CDL – You can't do it on your own..

Community driven approach

The Ex Libris community formed The CDL Advisory Group, providing advice, user stories, workflows and shared experiences on the various areas related to CDL mainly focused on three areas relevant for Controlled Digital Lending:

Copyrights group

Circulation group

Resource sharing group

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The CDL Advisory Group

Harvard

BLC — Boston Library Consortium

Georgetown University

Western University · Canada

Orbis Cascade Alliance

University of Windsor

The California State University — Vox Veritas Vita — 1857

The University of Tennessee Knoxville

Whitman College

Penn — University of Pennsylvania

FALSC

University of St. Thomas

The New School

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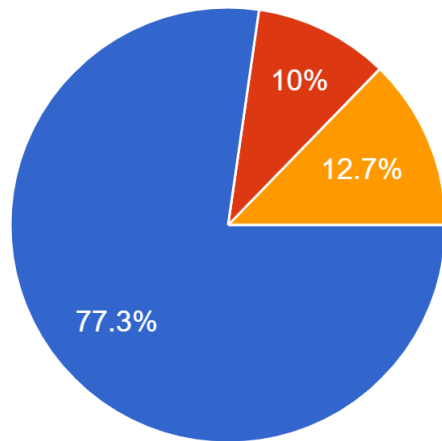Part of **Clarivate**

But who really wants CDL?

- Together with the Advisory Group we launched a survey with very interesting results and broad participation
- 94 institutions provided responses

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CDL Survey

Is your institution interested in controlled digital lending?

110 responses

● Yes
● No
● We have already implemented a CDL solution

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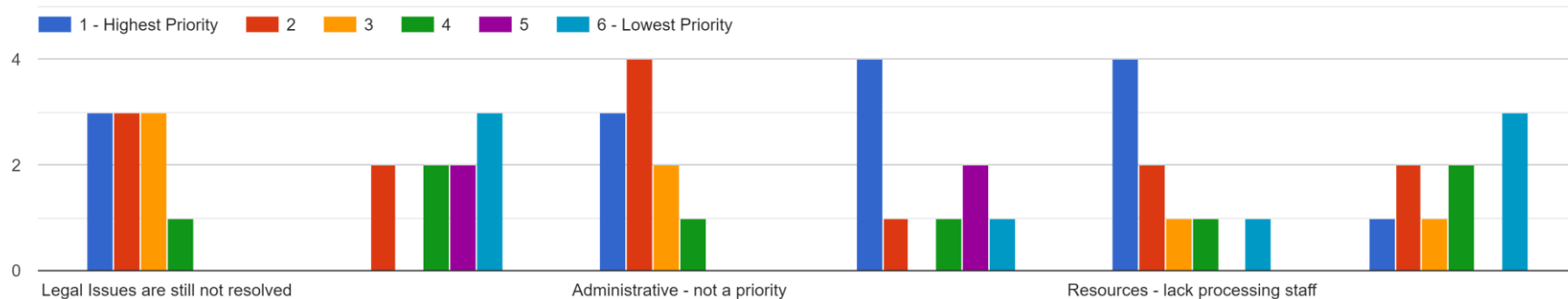
CDL and Library Usage

Please indicate for which use cases you would like to apply CDL

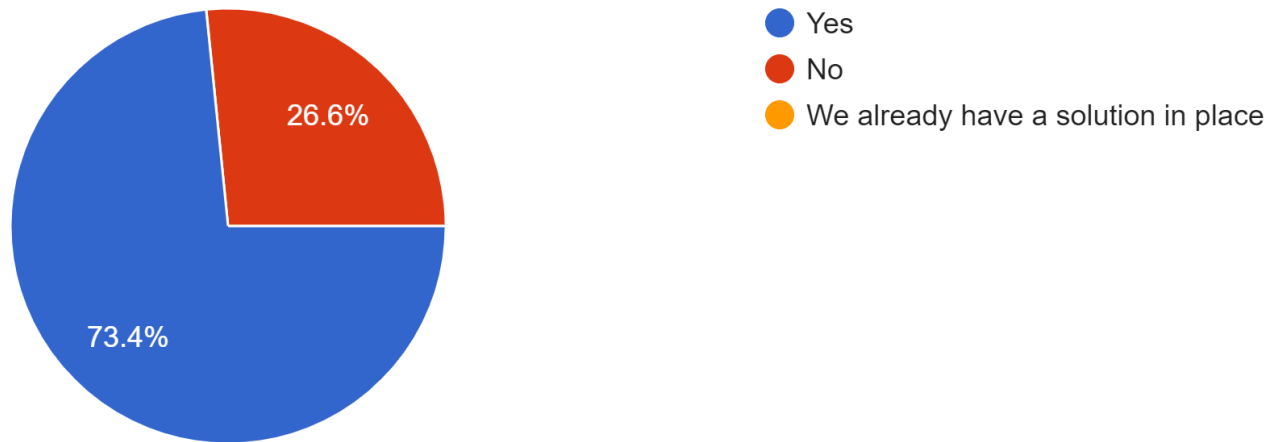82 responses
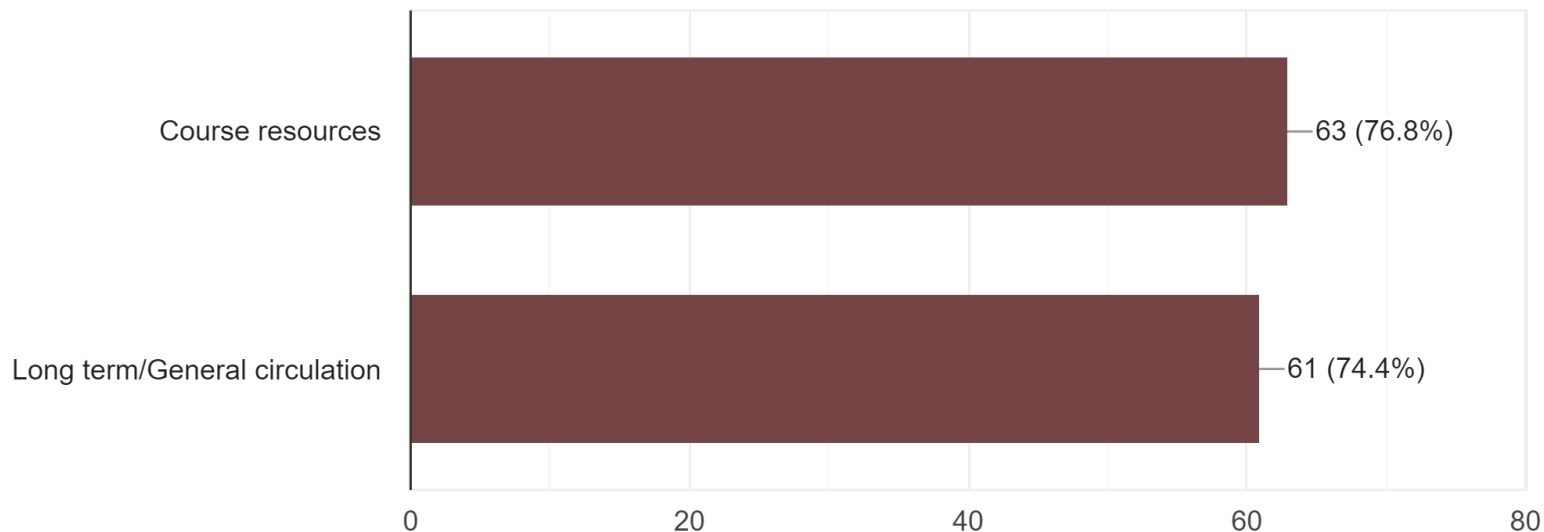
CDL – Decision Making

Please rank in order of priority in deciding to implement a controlled digital solution for course reserves or general circulation at this time.

CDL and Resource Sharing

Is your institution interested in implementing CDL flows for inter-library loans (ILL)?

109 responses

- Yes
- No
- We already have a solution in place

26.6%

73.4%

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CDL – Decision Making

Please rank in order of priority in deciding to implement a controlled digital solution for inter-library lending at this time.

What is happening now?

Working with a group of development partners

If you would like more information or
to discuss my presentation, please contact us at
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