

# Collaborating to Explore Controlled Digital Lending as a Library Consortium

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## **EXECUTIVE SUMMARY**

*In 2020–2021, the Boston Library Consortium (BLC) explored the potential for controlled digital lending (CDL) across the library consortium. Over the course of a year, the BLC’s CDL Working Group engaged with internal stakeholders and external partners to develop a strategic vision for consortial CDL that received strong support from the BLC’s Board of Directors. The group arrived at this vision through intensive collaboration, working closely as a group and engaging with the BLC’s various membership communities while concurrently engaging with vendors and external entities to cross-pollinate ideas and co-create strategies. The BLC’s resultant vision for consortial CDL is also predicated on powerful intra-consortial and inter-consortial collaborations to create the technologies for making CDL possible. This chapter is a case study of how this vision emerged and demonstrates its applicability to other types of consortial collaboration.*

## **INTRODUCTION**

In fall 2020, the Boston Library Consortium’s (BLC) Board of Directors convened a Working Group to develop a pathway for the consortium’s members’ libraries to implement controlled digital lending (CDL), a method by which libraries can digitally lend materials under controlled conditions. Specifically, the Board of Directors charged the Working Group with investigating the potential for a *consortial* imple-

mentation of CDL among interested BLC members' libraries. The BLC sought to answer the question of how consortia could scale CDL beyond intralibrary lending and course reserves. The Working Group spent 10 months of intensive efforts exploring the possibilities for CDL and developing a collaborative model to enable the BLC to pursue those possibilities. In August 2021, the Board of Directors resoundingly approved the Working Group's recommendations for consortial CDL. This outcome reflected the strength of the process with which the Working Group had engaged the BLC community as well as external partners.

This case study draws on the experiences of the Working Group's leaders to examine ways in which library consortia can collaborate to accomplish significant outcomes while maintaining inclusion and transparency throughout their work, and in a way that extends their impact to the broader library landscape. Through an exploration of how the Working Group engaged with the BLC community and a range of external partners, this case study demonstrates how to navigate consortial initiatives successfully and how to foster collaborations across multiple consortia. The Working Group overcame complexity and ambiguity to forge a path forward for consortial CDL. The sheer magnitude of the CDL undertaking and the decentralized and diverse nature of the BLC make this case study uniquely applicable to a wide range of libraries and consortia.

## **SETTING THE STAGE**

### **Library Consortia**

According to the U.S. Code of Federal Regulations, a library consortium (plural: consortia) is

*any local, statewide, regional, or interstate cooperative association of libraries that provides for the systematic and effective coordination of the resources of schools, public, academic, and special libraries and information centers, for improving services to the clientele of such libraries. (Universal Service Support, 1997)*

The scale, structure, and scope of activities is wide-ranging. Consortium leaders are known to joke that, "if you know one library consortium, you know one library consortium," highlighting the variety inherent to this work. Consortia may operate internationally, nationally, regionally, statewide, or even within a single municipality. Some are informal collaborations, while others are well-established, independent, nonprofit organizations or state-sponsored institutions. A library consortium may consist of a single type of library or multiple types of libraries. Some consortia exist for a specific singular purpose, while others pursue multiple activities on behalf of their members. Most focus on one or more of the following activities (Arch & Gilman, 2017):

- Resource sharing activities, including interlibrary loan and delivery services.
- Systems and infrastructure activities, including integrated library systems, shared off-site storage, and digital repositories.
- Group purchasing activities, including cooperative purchasing of library materials and databases and licenses for electronic resources.
- Training and professional development activities to strengthen the expertise of library workers.

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