Controlled Digital Lending: A Discussion

CARLI Public Services Committee - April 21, 2022

NOTES

Introduction: Chad Kahl

- [Committee Roster, CDL Definition, Survey Results](#)
- [Controlled Digital Lending Resource Guide](#)

Moderator: Cynthia Kremer

Speakers:

- Leslie Starasta, Lincoln Christian University
- Devin Savage, Illinois Institute of Technology
- Jen Sauzer, Columbia College Chicago

Prepared Questions

What factors affected your decision to use / not use controlled digital lending?

- Student need; We needed a way to maintain access to course materials.
- The pandemic and access to course materials.
- Staffing and technology

What have you learned in the process of considering or implementing CDL?

- Only way to provide materials, exhausted all other options for providing the user the needed resource
- Ease of which it can be done but CDL requires a system or program that restricts sharing
- Conversations about how we provide our collections in the 21st century

What are the barriers to implementing CDL?

- Bureaucracy. Institutionally, who's going to allow or be alarmed? Administration? Legal counsel? Risk negotiation.
- Having the technology to create the digital format, but much is readily available.
- Important to have a person who understands and can work through technology issues.

Specific technologies or process?

- Use for course reserves: campus site license of Office 365 easily limits service to institutionally affiliated; Forms in 365 & then sent to access staff; call slips, book is pulled from reserves, limited scan of material and short-term loans with specific end time; file in One Drive and book is placed on clearly marked shelf that it is "on loan" & not available for others until loan ends. Very smooth once you setup the workflow.
- Similar process but use Google Drive. Scan item, upload with view only and expiration date.
- Use content management system with display only mode can link directly from the catalog's item record.

What would be broader benefits of CDL over time?

- Users are accustomed to digital access. Leveraging technology to provide formats patrons expect. It unlocks older materials. Look for an e-copy first to provide access, but many materials not available electronically.
- Support the curriculum by providing access to diverse formats. Need to balance the opportunities provided by CDL with the risk of not doing it. Address accessibility and equity to resources.
- Access to rare materials that are only available in-house; provide access to those who can not travel.

Audience Questions

What applications are you all using for CDL?

- CZUR ET 16 scanner; Google Drive
- SimpleScan scanner; Office 365

How do students request CDL items?

- Microsoft forms, submitted forms go to entire team and can be answered anytime
- Google form goes to their help desk ticketing system

How do people find the form?

- On our website & link though our catalog
- No marketing, respond to user requests and steered them to the available form; Requests increasing.
- Conversations with faculty who share information directly with classes as appropriate.
- Use digitization request form in Alma for articles may consider using it for this purpose.

If you have one user, how does that work for a course?

- For Office 365/OneDrive, material shared with one person, staff mediate and turn off access/permission at the end of loan period.
- Sharing via Google Drive works the same.
- Reserves model. Open to all, but only one can use at a time. Will buy more physical copies if needed to supply multiple user access.

If it's set to view only and print disabled, do people ask to print or download?

- No
- We get that question and just say no. No user pushback.

How many items do you scan per week?

- This depends on required readings and where they fall in the semester. But, ten requests may actually only require 1 or 2 scans as the requests are for the same material. Highest volume in a week was 10 but all for the same material.
- During Academic Year 2021 averaged six per week.
- Requests follows curriculum / semester trend.

Have you only done reserve books or used for non-reserve items? Only Print Material?

- Course reserves
- Course reserves
- Only loaned one item. It was from circulating collection with the loan the same as the physical item.

How long do you tell patrons digitizing will take?

- Similar language to ILL language.

Are you tracking or keeping scanned items for future possible use?

- Keeping on a drive, note currently checked out or not in use.
- With content management system tied to our catalog, can tell if the item has been digitized and can provide access when needed.

Do you limit loan time? What is average loan time?

- Loan is one to four hours as it takes the physical copy out of circulation.
- Advice that I've seen, says the loan should be the same as physical items. With reserves, it's more complex. May need a second copy in closed stacks may make sense in some cases.

Can patrons return things early or do they need to let you know to turn off loan?

- This hasn't happened as the loan is of short duration. Patron would need to let us know if they wanted to return an item before the end of the loan period.

How does this affect ILL?

- Being a small institution, it is inextricably intertwined.
- The difference is invisible to patrons.
- We only use for course reserves.
- We have separate staff for course reserves and ILL, but they are interlinked and staff across as a team.

Are you limiting your CDL services to your local institutional patrons?

- Yes

How have you dealt with item not being ready immediately?

- Provides user specific time. No problem in that regard so far.

How do you manage keeping the physical copy off the shelf during the digital loan?

- We have a shelf, and it is clearly marked "CDL Loan not available at this time."
- We have a closed stacks room and rotate the item into that room when on a CDL loan.

Do you include a copyright statement with scan?

- We do not as the ability to copy has been disabled.
- We rely on statement within the publication.
- There is recommendation from other practitioners to add a statement for risk management.

Could patrons do screenshots? Is there any limit on that?

- There isn't a way to limit, but this is the same with our physical collections.