

Getting Started with Kanopy: From Trial to PDA Implementation

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URL: <https://www.kanopy.com/>

Cost: \$150 per title for 1-year license; \$350 per title for 3-year license

Introduction

This overview shares the steps involved in implementing Kanopy's Patron Driven Acquisition (PDA) model for streaming films. Please see the [ANSS Currents Spring 2017 issue by Carolyn McCallum and Jeff Eller](#) for a review of Kanopy's film content for Anthropology, Sociology, and Criminal Justice.

Speaking as a newly tenure-track librarian at a small, regional campus library with zero to little budget for streaming films, it can be daunting when attempting to investigate and introduce a potentially new resource, such as Kanopy, to your library. However, I knew that providing access to streaming films was a growing trend on our campus where we have a strong online program and most faculty need their films to be accessible via Canvas. It is even more essential now as most of our classes are online due to Covid-19.

In the fall of 2019, I received a request from a faculty member who wanted to show a couple of films for her online sustainability course. One of those films was available on Kanopy. This prompted me to finally tackle the issue of providing streaming films on our campus and to take advantage of a [free trial of Kanopy](#).

The Trial

Since I had spoken to a Kanopy representative before, I still had their contact information and I reached out to them personally about starting a trial for our campus. I remember the first time I reached out to Kanopy via their [contact form](#) and they were quick to respond to my questions. They usually reply within hours, but sometimes up to a day, as they have representatives in different time zones.

The initial trial of the entire Kanopy collection was short, just 20 days. I asked if we could extend the trial for at least another week, to get almost a full month, and they happily agreed. I would recommend asking upfront for a "month long trial," at least, versus just asking for a trial.

For the trial, they will send a custom link and login information. You can share the information with whoever you want, but for our situation, we promoted the resource to faculty only. When you set up the trial, they will also offer you and anyone else who is interested an overview webinar in order to get a better sense of the collections they offer, user experience, and the Admin Dashboard. The webinar runs for about 30-45 minutes. Kanopy does offer apps in which their products can be streamed, but their trials work best in a web browser as their apps are more designed for their fully launched platform as opposed to their trial platform.

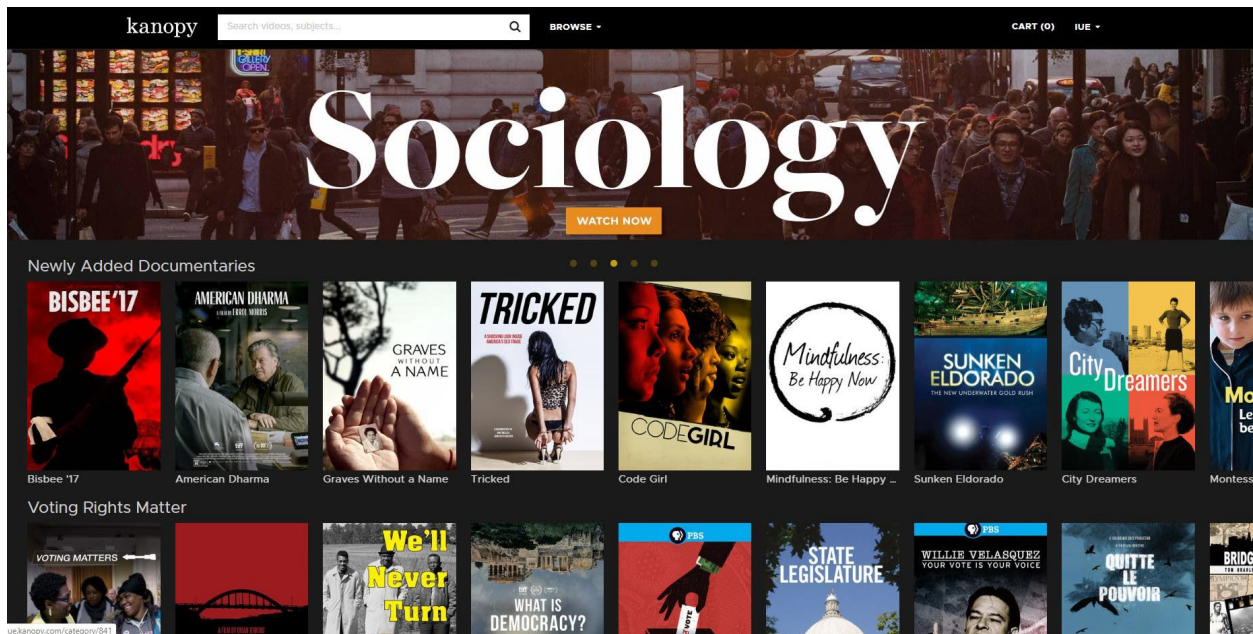


Figure 1 Subject browse of Sociology-home page

Since we were looking at Kanopy as a faculty resource to provide easy access as well as the appropriate permissions to films needed for online classes, we did not promote this trial to students. I sent the login information and the brief description of what Kanopy is to my subject liaison colleagues to share and promote the trial with their schools. I personally reached out to a handful of faculty members who had recently contacted me about obtaining films for their fall semester classes. I asked for feedback on the ease of use and the content available from Kanopy and any other questions or comments that the faculty might have had about it.

When the trial is over, Kanopy will send you analytics on the trial and can provide you with details on the most played videos, suppliers, and subjects.

Your Trial



Your trial saw 84 total visits, 107 film pages visited, 49 total plays and 889.98 total minutes watched.

Figure 2 Analytics Summary from the Admin Dashboard provided by our Kanopy representative

Setting Your Budget

If your trial is successful and you receive great feedback from your users, you might be ready to consider your budget and purchase options. Most libraries that use Kanopy have some form of a Patron Driven Acquisition (PDA) program setup for this. I mentioned that my library really had no money initially budgeted for streaming films, but we had canceled our subscription to one database due to low usage, so we planned to use that amount to move forward with Kanopy. My Kanopy representative also offered to give me a budget estimate of how much we would expect to spend with rolling out the entire Kanopy catalog via PDA by looking at similar university libraries of our size and profile. The expected annual budget for a regional campus library with an FTE of 3,500-4,000 rolling out the entire catalog via PDA is approximately \$12,000-\$15,000. Our proposed budget, to start in the 2020 spring semester, was a very modest \$1,300. With the default price of \$150 for a one-year license, we could provide 8 films via Kanopy to classes that need them.

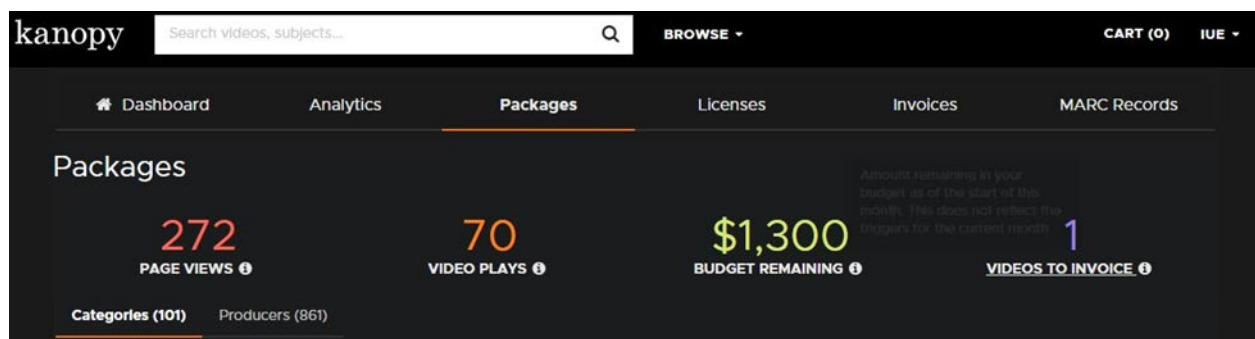


Figure 3 Packages overview from the Admin Dashboard highlighting our price cap of \$1300.

Once you have your budget, you can give Kanopy a price cap, the max amount you have or want to spend, and once you reach it, the program pauses. Films triggered and purchased will still be accessible, but all the others will not be. A request form would appear instead, which would go to whoever you

assign to be the contact, and films can then be purchased à la cart, if necessary. You can also choose to either have Kanopy bill you monthly, if any films have been triggered, or you can pay upfront with your cap amount. If you choose to pay upfront and you do not reach your cap, then any unused deposited funds will roll-over. You are welcome to not place a cap, but if you do, you can always adjust it.

Curate Your Collection

For several reasons, having Kanopy’s entire catalog open for PDA wasn’t an option for us: 1) Kanopy’s estimate for our campus rolling out the entire catalog via PDA was way out of our budget range and 2) Discussions with my colleagues from the other regional campuses about Kanopy informed me that they have had some trouble with going over their budget with this model and that Kanopy does not always “turn off” the collections when a library’s cap has been met. I suspect that this is due to the dashboard not always reflecting the most current information. For example, in one month we triggered one film and purchased another à la cart, but our budget cap still showed \$1,300 in the Admin Dashboard. The “Budget Remaining” information does not reflect the current month’s purchases. However, Kanopy stated that they will send reminders when you spend certain percentages of your cap, so you should have some idea when you’re getting close to your cap, even if you’re not checking the Admin Dashboard regularly.

Between the trial and the past film requests we usually received, we had a good idea of which departments usually request films and the most popular subject areas the films cover. We ultimately decided to just have the “Documentaries” genre collection open for PDA and the rest could be purchased à la cart by request. This collection is large at 6,416 videos and it overlaps with a lot of the other subject areas that we get requests for, such as business, social sciences, and education.

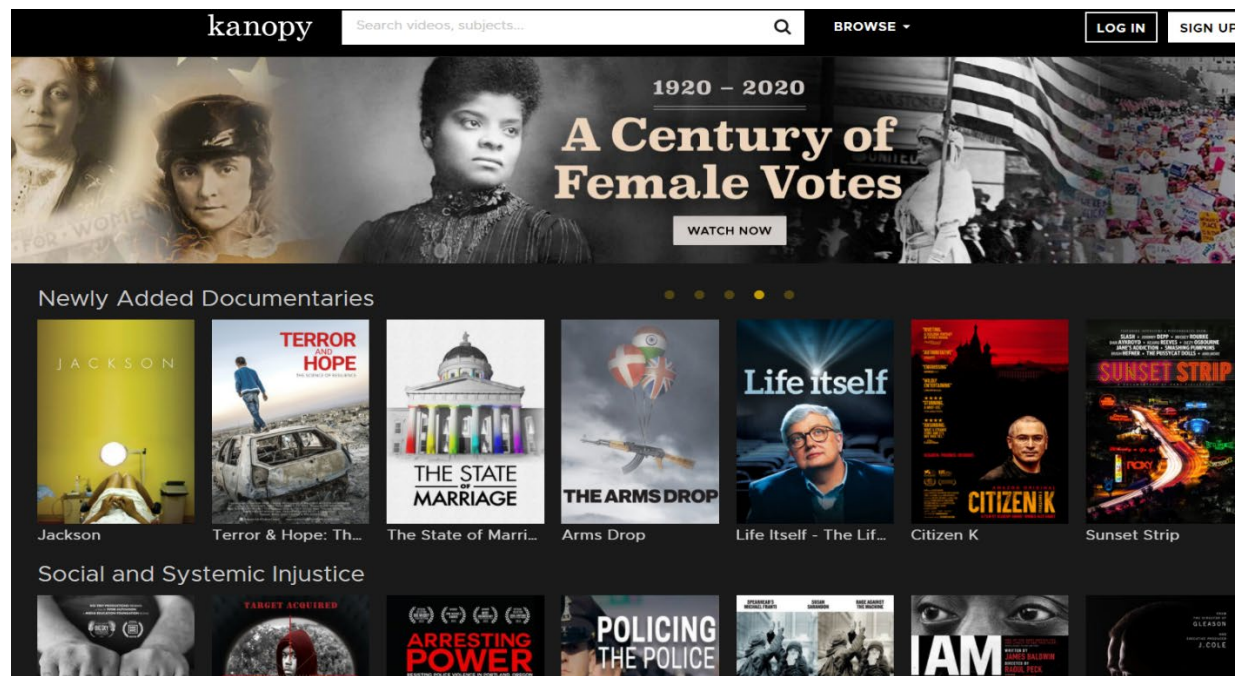


Figure 4 IU East Kanopy home page- defaults to our open genre collection of documentary films.

If staying within a specific budget is important to you, as a precaution, be sure to keep an eye on your cap and invoices. Both can be easily viewed in the Admin Dashboard. You can also choose to have all the

collections “closed” and have à la cart purchasing instead. In this case, patrons can view the entire Kanopy catalog and they can fill out a request form when they click on the title they need. The request is then sent to your library’s Kanopy administrator for review and purchasing.

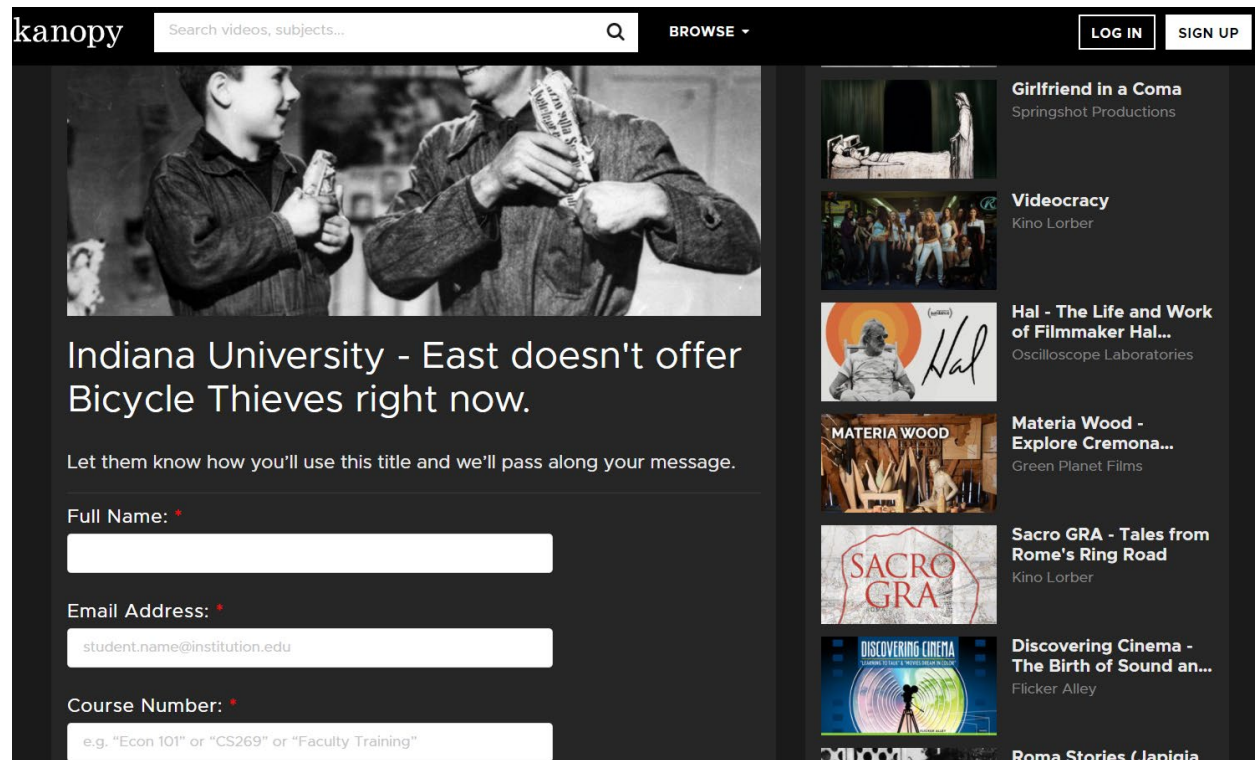


Figure 5 Title request form for "closed" collections.

Whether you choose to start with a full PDA, à la cart, or a collection-specific model that fits your library, you are free to open or close collections and to adjust your program at any time.

Setting Up Access

Setting up access is straightforward and consists of a few back and forth email messages. After we finalized the contract, Kanopy sent us an order form and license agreement, which we reviewed, signed, and returned.

The second step is authentication. We gave them our chosen authentication information, our proxy prefix and IP ranges. They then provided us with proxy stanzas we needed to add our EZ proxy. Kanopy typically authenticates via IP ranges for on-campus access and EZ proxy for off-campus, but they do offer other options.

The third step is confirming budget design. This is when you confirm your price cap, if any, and decide whether you would like to pay any allocation upfront or pay as you go. We decided to pay as we go, and we had our acquisitions department set up a purchase order (PO) for us in preparation of future Kanopy invoices.

Finally, let them know the date you would like to go live. Once you are about to go live, they will send you your campus or library specific URL, the login information for the Admin Dashboard, and

instructions on accessing Marc records. They will most likely offer you another webinar opportunity to go over the Admin Dashboard and to answer any lingering questions.

Ready to Roll

Now that Kanopy is set up, you can advertise and promote it however best suits your needs. We personally did not advertise widely to everyone, since we were using this more as a faculty resource for coursework, so we just promoted it amongst faculty. We did add the link to our A-Z Resource List as an access point. Although we had a lot of views for various films, we only triggered one film and purchased another à la cart during the 2020 spring semester. Already, we have more interest in films via Kanopy for the 2020 fall semester.

Due to Covid-19, a lot of academic libraries and universities are currently struggling financially and facing budget cuts, and my library is no exception. I know my library cannot afford to meet all our current streaming needs right now with the budget we have set via Kanopy, but we can do what we can and then get creative with the rest. After all, we librarians are pretty good at being creative and doing what we can with dwindling budgets. It may not seem the best time to approach Kanopy or to add another resource for some libraries, but as we are facing hybrid or virtual only instruction, there may not be a better time to give Kanopy a try.