

# 2020 Collection Development Committee Recommendations

## DRAFT 5 – With Steering and Board Feedback

In 2019, the Collection Development Workgroup became the Collection Development Committee. They started work on creating these recommendations in Fall 2019. They met in October and December to discuss known issues and concerns.

In addition, a Roundtable of the Board, Steering Committee, and Collection Development Committee was convened in Fall of 2019. The meeting had two primary goals:

- To discuss the goals and value of the collection and to create unified messaging around these goals and value.
- To discuss how to move the consortium and collection forward to meet the goals and enhance the value of the collection

There were two outputs from this meeting:

- Statements that were developed and affirmed by all those attending.
- Group statements/recommendations/activities from small group discussions around specific topics.

Both of these outputs are referenced in the recommendations below. Details from this day can be found at <https://wplc.info/roundtable>

Through conversations with the Collection Development Committee, other governance groups and this roundtable, the following areas of focus have been identified for 2020-21:

### **High holds and related patron dissatisfaction**

High holds and related patron dissatisfaction continue to be a concern for WPLC. While our average wait time has decreased from 53.86 days in January 2017 to 42.79 days in January 2020, the wait time is still perceived as too long. Particularly frustrating for patrons is long wait times for titles that are not current best sellers.

A statement generated at the 2019 Roundtable supports this area of focus: *We should focus our budget on reducing holds based on patron satisfaction and creatively continuing to grow the collection.*

**The Committee recommends the following activities for this area of focus:**

***Increase budget by a fixed amount based on a 5% increase each year for 5 years, beginning in 2021 and start an evaluation of the increase during 2023 to determine the impact and proposal for the next 5 years.***

A 5% increase for the next five years would be the following for each year. (Note these amounts are approximations. The actual buying pool amounts for each system are calculated each year based on a percentage of previous year's circulation and population. The amount does also not include the annual Partner fees.)

2021: \$60,375  
 2022: \$63,394  
 2023: \$66,563  
 2024: \$69,892  
 2024: \$73,386

An average of these amounts is \$66,722. In order to apply a fixed rate for each year, an average of these amounts would be used. The approximate cost for each system, with this fixed rate, for the next five years is below:

**WPLC Buying Pool with potential increase each year, by system\***

	2020	2021	2022	2023	2024	2025
Arrowhead Library System	\$29,222	\$30,836	\$32,451	\$34,066	\$35,680	\$37,295
Bridges Library System	\$117,448	\$123,938	\$130,427	\$136,917	\$143,407	\$149,897
Indianhead Federated	\$106,995	\$112,908	\$118,820	\$124,732	\$130,644	\$136,556
Kenosha County Library System	\$29,093	\$30,700	\$32,308	\$33,915	\$35,523	\$37,131
Lakeshores Library System	\$47,566	\$50,194	\$52,822	\$55,451	\$58,079	\$60,707
Manitowoc-Calumet Library System	\$18,332	\$19,345	\$20,358	\$21,371	\$22,384	\$23,396
Milwaukee Co. Federated Library System	\$134,908	\$142,362	\$149,817	\$157,271	\$164,726	\$172,180
Monarch Library System	\$86,520	\$91,300	\$96,081	\$100,862	\$105,643	\$110,424
Nicolet Federated Library System	\$82,433	\$86,988	\$91,543	\$96,098	\$100,653	\$105,208
Northern Waters Library Service	\$36,039	\$38,030	\$40,021	\$42,013	\$44,004	\$45,995
Outagamie Waupaca Library System	\$49,283	\$52,006	\$54,729	\$57,452	\$60,175	\$62,898
South Central Library System	\$257,867	\$272,116	\$286,364	\$300,613	\$314,862	\$329,111
Southwest Wisconsin Library System	\$26,074	\$27,515	\$28,955	\$30,396	\$31,837	\$33,278
Winding Rivers Library System	\$60,504	\$63,847	\$67,190	\$70,534	\$73,877	\$77,220
Winnefox Library System	\$65,175	\$68,776	\$72,377	\$75,979	\$79,580	\$83,181
Wisconsin Valley Library Service	\$60,043	\$63,361	\$66,679	\$69,997	\$73,315	\$76,632
<b>Total Buying Pool Amount</b>	<b>\$1,207,500</b>	<b>\$1,274,222</b>	<b>\$1,340,944</b>	<b>\$1,407,666</b>	<b>\$1,474,388</b>	<b>\$1,541,110</b>

\*Note these amounts are approximations. The actual buying pool amounts for each system are calculated each year based on a percentage of previous year's circulation and population. The amount does also not include the annual Partner fees.

At the Roundtable, the following statement was affirmed by attendees: *The shared collection needs more money to support a strategy to deal with the collection issues.*

The Sustainable Increases Group developed the following group statement: *Funding for the shared collection should increase by 5% a year for the next five years. A reassessment process will begin at 3 years to determine effectiveness.*

This proposal from the group allows for increased funding that is predictable while also recognizing the need to evaluate that increase rather than have it continue in perpetuity.

The group also developed some specific tasks for this activity:

- The Collection Development Committee will determine the split between the consortium collection and Advantage for the increases.
- The Collection Development Committee will come up with a proposal for metrics (patron satisfaction by zip code, etc.) to determine impact and the Board/Steering will review. Potential metrics could include holds, satisfaction, patrons checking out by holds vs. immediately available.
- The Steering Committee should discuss messaging about the increase, including using information about percentage of spending for collections, use of collections, etc.

This recommendation would be included in the 2021 budget and additional funds would be available in January 2021.

***Explore partnerships and other avenues for increased resources and maximizing the use of the collection.***

The Sustainable Increases Group recognized that additional funding from the partners and member libraries are not the only potential source for funds for the collection. They recommended also exploring partnerships and other avenues for increased resources and maximizing the use of the collection. They suggested some specific tasks for this activity:

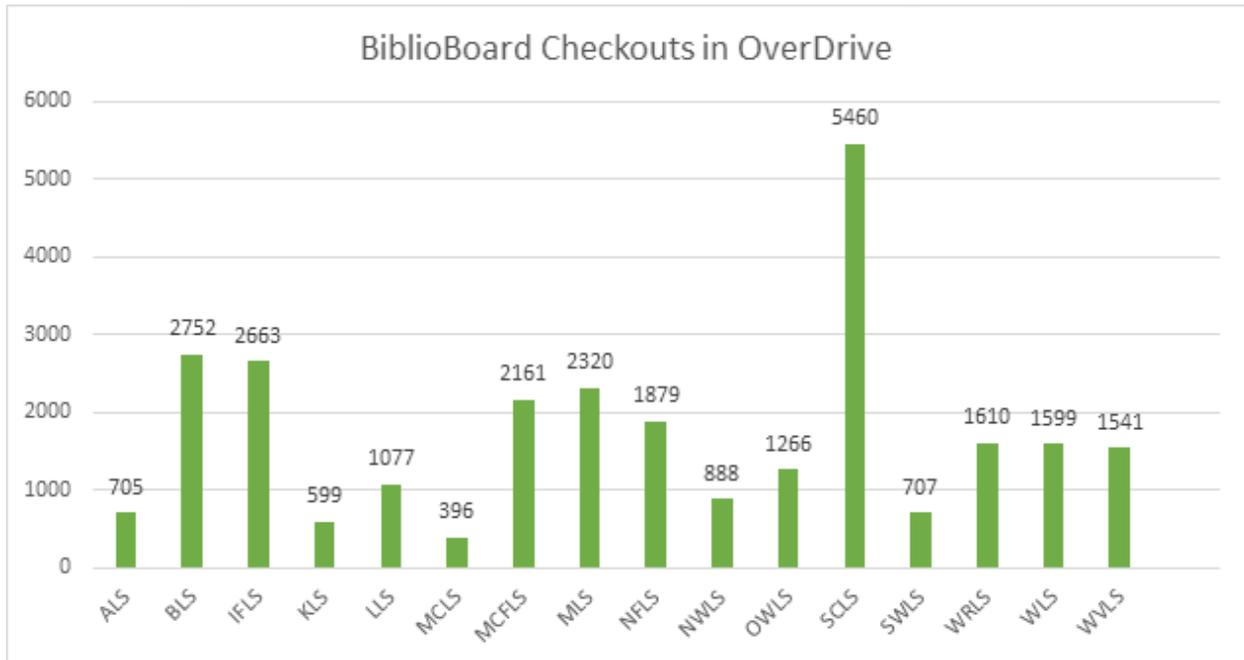
- The Board will create a committee to focus on advocacy and explore funding partnerships and collaboration with potential partners including COLAND, the state education community, counties, private companies, etc.
- The committee of the Board will open a conversation with LD&L for state level funding.
- The Project Managers will approach OverDrive to request the reduction of platform fees or the conversion of these fees to content.

Other options would be explored as part of this activity. The work on this activity would begin in July 2020.

***Increase always available content***

During the roundtable, the following statement was affirmed by the group: *"Having a robust collection of immediately available, desirable, and expected titles is important."* The group further clarified that this content should be what patrons want.

WPLC has had great success with simultaneous use content available through OverDrive.



The CDC is recommending that the Selection Committee and Project Managers be allocated additional funds from the budget for high-quality simultaneous use content when it is available. This activity would begin in June 2020.

***Research and evaluate the balance of purchasing up front vs. purchasing by holds to determine the most effective way to purchase in light of continuous publisher model changes.***

There are two approaches for purchasing title that are likely to be popular:

- a. Purchase many copies up front in order to avoid holds.
- b. Purchase fewer copies up front and purchase additional titles to fill holds as needed.
- c. Use recommendations in marketplace to help determine the number of copies purchased initially.

The most recent approach recommended by the Collection Development Committee was to purchase many copies up front. During conversations with the committee in 2019, the Selection Committee, and at the Roundtable, questions were raised about the effectiveness of this approach. Working with OverDrive, the project managers will develop a plan for evaluating these approaches and determining the most effective strategy.

## Cost effectiveness of purchasing/circulation models

OverDrive has many models for purchasing and circulating content:

- One copy, one user (OC/OU): A copy of a title is purchased and owned in perpetuity.
- Metered access (MA): A copy of a title is available for use by patrons for a specified time period or number of circulations.
- Cost per circ (CPC): The consortium is charged for each use of the title by a patron.
- Simultaneous use: An unlimited amount of copies of a title are available for patrons to use for a specified amount of time.
- Lucky Day: Some copies of a title (either OCOU or MA) are designated to not allow holds, giving patrons immediate access to those copies.

Ideally, the consortium would be utilizing any of these models that help to develop the best possible collection with the funds available. However, it may not always be clear to selectors and to the consortium members what models should be used and why. As such, two activities have been identified to help with this area of focus:

### ***Clarify and document what publisher and model factors are being considered as content is purchased.***

Working with OverDrive, the project managers will document what publishers and model factors are being considered as content is purchased. The Selection Committee will weigh in on this process and review the document. It will serve as a guide for consortium and Advantage selectors and will be updated as experiments and information gathering lead to new models for purchasing. This activity would begin in June 2020.

### ***Educate all members of the consortium about available models and how they are being utilized.***

Once it is clear how the various models are being used, this information would be shared to educate all members of the consortium about the various models, how they are currently being used, and what to expect in the future. This activity would begin in November 2020.

## Publisher issues

Recent changes in the publishing landscape have led to issues with collection development for WPLC. Specifically, Macmillan Publishing has introduced an embargo that limits the number of ebook copies the consortium can purchase during the first 8 weeks of publication. As a result of this policy, WPLC is currently boycotting any new ebook titles from Macmillan. While Macmillan is the first publisher to implement these unfavorable policies toward libraries, they certainly may not be the last. The following are recommended activities to help us with this area of focus:

### ***Create a recommended list (good guys list) of publishers that selectors would use.***

During the roundtable, the group affirmed the following statement: *WPLC should increase spending with publishers that support our goals.* To help with this goal, the Project Managers would work with

OverDrive and the Steering Committee to create a recommended list of publishers that selectors could use. In addition, the Collection Development Committee will research what other platforms publishers work with and those various purchasing models to potentially help supplement audio. This activity would begin in June 2020.

***Work with other libraries/consortia to share data to better understand publisher landscape.***

During the Roundtable, the following statement was affirmed by the group: "WPLC should strategically monitor and participate in the development of national efforts around digital content." One way we can do this while also progressing on this area of focus is by working with other large consortia and libraries to gather and share data to help with our understanding of the publisher landscape and the impact libraries have within this ecosystem. WPLC is already gathering such data through the patron focus group and our own local Big Read programs. By sharing that data nationally and working with others to collect similar data, we hope to gain understanding of our most effective strategies in combating unfavorable policies by publishers.

## **Advantage effectiveness**

The Advantage program, primarily used by systems to purchase additional copies of titles for their patrons, is an important part of the collection development strategy of WPLC. At the Roundtable, a group discussed Advantage and how the consortium can make the program work most effectively. They identified the following activities toward that goal:

***Evaluate the success of the hold reduction program (satisfaction, circulation, etc.)***

The holds reduction program, which has been in place since 2018, takes \$150,000 from the shared budget and allocates it to each system to purchase copies of high-hold items. Working with OverDrive, the Project Managers would develop a plan and gather data to evaluate the effectiveness of this program in reducing holds. This activity would start in June 2020.

***Provide guidance and support to Advantage selectors***

While some systems have Advantage selectors that prefer to work independently, others could benefit from more guidance and support. Working with OverDrive, the Project Managers will create a plan for providing guidance and support on an ongoing basis so that all Advantage selectors are able to effectively purchase for their systems.

For all selectors, tools to quickly make decisions about purchasing and to help them do their job most efficiently would be beneficial. These tools could include a user group, a knowledgebase of information and processes, video tutorials, etc. The Project Managers will work with the Advantage Selectors to plan the development of such resources.

In addition, information about consortia-wide collection efforts (boycotts, holds reduction goals, etc.) needs to be regularly communicated.

All of these activities would start in June 2020.

## Collection Development of Series

An ongoing challenge in the OverDrive collection is series. Specifically, the following issues impact the collection of series:

- a. Some audiobook titles in a series are available as simultaneous use, but not all of them are. This leads to high holds on future titles in the series and the need to purchase more copies of a title.
- b. First titles in the series have very high holds.
- c. Not all of the titles are available in series. This is mostly due to a change in publisher.
- d. Series title management is currently time-consuming and cumbersome for selectors and project managers.

Regardless of the cause, not having adequate copies of a complete run of a series leads to patron dissatisfaction. To address this issue, the following activities are recommended:

- Work with OverDrive to develop a list of currently owned titles that are in a series and identify gaps in that series.
- Purchase gaps in a series and work with OverDrive, if necessary, to connect with publishers to gain access to those titles.
- Inquire with OverDrive if there is potential a be a discount if multiple titles of one series are purchased or implement a standing order for series titles.

## Magazine Collection

The Steering Committee and Collection Development Committee both considered the addition of a magazine collection as part of this recommendation development process. There are three services which offer magazines. Details about the services, including number and names of titles can be found [here](#).

*To better understand the statewide need, the recommendation is to do a statewide survey of interest in magazines.*