WPLC Collection Development Committee 2020 Recommendations Update – October 2020

I. High holds and related patron dissatisfaction

1. 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.

- 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.

  UPDATE: Project managers have met and have added some questions to the patron survey, which will go out in November, to create baseline data and then will re-survey in fall of 2021 for evaluation. Project managers will run stats throughout the year, first in December for baseline data and then quarterly throughout the year. The statistics will include wait times, collection counts, circulation and format and purchasing information. Project managers have identified the following goals for the increase:
  - **Goal 1: Decrease wait times by 5%**
  - **Goal 2: Increase number of materials available in available-now purchasing models (CPC, simultaneous use, lucky day) by allocating $250,000 toward that collection.**
  - **Goal 3: Increase the availability of the collection as a browsing collection. - increase the average number of available items to checkout by 5%.**

- The Steering Committee should discuss messaging about the increase, including using information about percentage of spending for collections, use of collections, etc.

  UPDATE: Project managers will be taking this topic to the Steering Committee for discussion at their November meeting.

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

- 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.

UPDATE: A committee of the Board will be recruited at the next Board meeting, October 23, 2020. Potential identified activities for this group:

- **Explore funding partnerships and collaboration with potential partners including COLAND, the state education community, counties, etc.**
- **Start a conversation with LD&L for state level funding.**
- **Consider strategies for private or grant sources of funding.**
- **Explore county reimbursement and counting of digital circulations in non-libraried resident use**

3. Increase always available content
   - 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.

     UPDATE: Since March 2020, the WPLC has added 938 Sim Use titles to the WI Digital Library for $38,000 and the average circulation per title is .18.

4. 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.
   - 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.

     UPDATE: Project managers worked with OverDrive to develop a report called an Alternative Lending Model report which identifies the most cost effective model to fill holds on titles with significant holds. This report allows us to identify titles with high holds and/or high hold ratios and then provides the dollar amount it will take to fill the holds on titles using the most cost effective model. This report was invaluable to help disperse the $250,000 in funding the WPLC received from DPI in IMLS pandemic funding.   We are hoping to be able to scale this report down so it can be used monthly to help fill holds efficiently and economically. In addition, selectors have moved to a new model of purchasing bestseller titles. They purchase up to 5 copies initially, and then a variety of hold reports are run weekly from which titles are purchased. Finally the selectors introduced the cost per circ model and added several thousand Lucky Day (no holds allowed) titles since June. We have seen significant changes in average wait times over the past year, even with increased usage of the collection due to library closures.

II.   Cost effectiveness of purchasing/circulation models

1.   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.

  UPDATE:
  - ● **A glossary was created, with information about the different lending models by publisher. Will be reviewed by the Steering committee.**

  Additional work or research questions may be directed by the Selection Committee.

2.   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.

  UPDATE:
  - ● **Collection-level information (all formats, all genres) about purchasing practices and checkouts by lending model, 2014-2019.**

  Possible additional tasks include: brief Q&A of selectors to hear how they determine whether to purchase OC/OU or MA if both are available, whether they take lending model into consideration when determining which titles to purchase, etc.

  Additional work or research questions may be directed by the Selection Committee.

III.   Publisher Issues

1.   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.

UPDATE: Project managers would like to suggest that given the dynamic publisher landscape and the sheer volume of publishers, focusing on favorable lending models that can then be easily identified in OverDrive's Marketplace would serve selectors better than maintaining a list of publishers. This work has already begun in the Cost Effectiveness of Purchasing Models section of this document.

2.   Work with other libraries/consortia to share data to better understand the 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.

    UPDATE: In January 2020, Sara Gold attended the ALA Midwinter Conference in Philadelphia. There she attended the Association of Special, Government and Cooperative Library Agencies (ASGCLA) Ebook Meeting which includes state librarians, consortia around the country and Canada, publishers and distributors. She gave a report to the group about our interest in working with other consortia to advocate for better terms and lending models from publishers and shared the proposed Local Big Read project which was put on hold in March due to COVID. There was great interest from Penguin Random House and several consortia regarding the Local Big Read and Sara connected with Guy Gonzalez from the Panorama Project to fold him in. Our hope is to roll out that project to coincide with National Library Week in 2021. Sara also attended a session with John Sargent, former CEO of Macmillan, and was able to express the WPLC's frustration over the unfair lending model including an embargo that was instituted by Macmillan. The Macmillan embargo was lifted in mid March due to lagging sales after a national boycott of Macmillan titles was implemented by many consortia including the WPLC. From April through September the project managers have kept in touch with Minitex, RAILS, Califa, Whatcom County Library System in Bellingham, WA, the Washington State Library, and the Ohio Digital Library about national advocacy efforts for better ebook models, COVID 19 planning for digital libraries, and how we can effectively work together when we are unable to meet in person.

The WPLC Project managers have been in conversation with DPI and DPLA staff regarding the SimplyE platform. SimplyE is an open-source e-book platform developed by New York Public Library that can host audio and ebook content from a variety of vendors including DPLA's open access/public domain collection. SimplyE is a solution several states have implemented, however none of these states have a statewide Overdrive digital consortium akin to the Wisconsin Digital Library. Project managers will continue to explore how other consortia are engaging with this platform, including a conversation in late September with Minitex. The prospect of investing in a project that is potentially challenging publishers to offer different and more favorable lending models is exciting and an important consideration for the WPLC. For the time being however, SimplyE is not an attractive option for the WPLC because it is not compatible with kindle users and although audiobooks are now available, no consortium has implemented the audio format yet. In addition, patron satisfaction is extremely high with the Libby app.

IV.   Advantage effectiveness

1.   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.

   UPDATE: Project managers will be identifying the data needs for evaluation later this fall. The data will then be run on past years in January so all of 2020 can be included.

2.   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.

   UPDATE:
   ● **We've started to pull together resources for Advantage selectors.**

- **A more comprehensive draft support plan will be proposed in December-January, in collaboration with Advantage selectors.**

V.   Collection Development of Series
1.   An ongoing challenge in the OverDrive collection is series.
- 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 for a discount if multiple titles of one series are purchased or implement a standing order for series titles.

UPDATE: The Selection Committee has assigned a selector specifically to work on identifying series in adult fiction and ordering titles not currently owned in those series to fill in gaps. We have seen a marked improvement in title availability since the concerted effort has been made to identify titles.

The WPLC Project managers have talked to other consortia about working collectively to encourage OverDrive to actively pursue acquiring the rights to titles in series not currently available through OverDrive. There is interest in this project however, it was found that many of the series titles in audio are owned by Audible and are not available for purchase by libraries. The Selection Committee will continue to work on identifying series titles for purchase.