WPLC Collection Development Committee Recommendations Update – October 2021

Recommendations approved in 2020 to be completed in 2021

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: Questions were added to the patron survey of 2020 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%.**

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: An Advocacy Workgroup was created. They have created a one page advocacy document to share with potential partners. In addition, they have held conversations with LD&L for state level funding and presented to COLAND. COLAND also authored a letter to the state superintendent advocating on behalf of WPLC.

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: Selectors and Project managers have been adding simultaneous use content when available.

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.

     DONE: 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.

DONE: A glossary was created, with information about the different lending models by publisher. It is available with other resources on the WPLC Site.

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.

     DONE: Resources have been compiled and are now available to the WPLC Community on the WPLC Site.

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.

     DONE: Project managers suggested 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 can be found on the WPLC Site.

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 a solution several states have implemented, however none of these states have a statewide Overdrive digital consortium akin to the Wisconsin Digital Library. The recent updates of SimplyE and the Palace Project were shared with both the Board and DL Steering Committee. Project managers will continue to explore how other consortia are engaging with this platform.

In July 2021, a list serv was created for OverDrive Users as a start of a user group. While attending OverDrive's Digipalooza, invited several other Overdrive users to join the email listserv to start converstations. This work will be ongoing.

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 are working with OverDrive on data and a PAR report for each Advantage account. A data dashboard for Advantage accounts was created and is updated quarterly.

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.

     DONE: Resources have been compiled and are now available to the WPLC Community on the [WPLC Site](.).

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.

        DONE: 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.

Recommendations approved in 2021 to be completed in 2022

I. Enhance Juvenile/YA collection development
    Demand for juvenile and YA materials seems to be increasing in the Wisconsin Digital Library, presumably due to the development of widespread remote learning for many school districts in response to COVID-19.

    The Collection Development Committee recommends further review of usage data from the Juvenile and Young Adult (YA) ebook and audiobook collections to see if adjustments in the collection budget amounts in these areas are warranted based on use.

    Currently the annual budget for the Juvenile and Young Adult collections is $20,000 in total or $1666 per month. There are several genres with assigned selectors. Each genre area is allocated $208 per month. It is recommended that additional copies be ordered in the following areas through weekly holds managers:

    Emerging Readers
    LGBT Fiction and Non-fiction Interest
    Graphic Novels
    Multicultural Fiction and Non-Fiction Interest
    Mystery/Thriller
    Sci-Fi/Fantasy
    Romance
    Series
    Spanish Language

    The following activities were identified:
    - Engage in in-depth collection analysis and identify gaps in the collection.
    - Explore reallocating collection dollars.
    - Prioritize reducing hold times for youth materials.
    - Raise public library awareness of the existence of local school digital e-book and audio collections and tools available for public librarians to better understand collection.
    - Run a quarterly data review of usage of Juv/YA materials to help understand usage and any needed collection allocation changes.

    UPDATE: Beginning to work with OverDrive on running need reports.

II. Improving the existing collection's accessibility and diversity
    In response to the need for greater depiction of underrepresented stories and voices, taking a closer look at existing diversity in the collection is timely and important. Accessibility concerns continue to be of paramount importance, as we advocate for expanded tools to enable use by readers of all

abilities. We strive to create a collection that is timely, relevant, and easy for patrons to search and utilize.

In response to the Black Lives Matter movement, OverDrive worked with publishers to obtain a simultaneous-use format of some diverse titles. Five titles were added to Wisconsin's Digital Library and those titles were checked out a total of 19,325 times in 2020. One of the titles, So You Want To Talk About Race, was the sixth highest circulating title of 2020. In addition 22 titles were added in June in the Cost Per Circ (CPC) format. These 22 titles circulated 26,707 times in just four months. Total cost for the CPC checkouts was $133,706.90.

There is a recognized representation gap in both publishing and library collections in terms of author voices and experiences. Educator Rudine Sims Bishop commented in 1990 that books and literature can function as windows, mirrors, and sliding glass doors for their readers and that view can help us frame the urgency of this recommendation.

The following activities were identified:
- Identify quality, key resources / tools to use in selector training and as checkpoints going forward. Some libraries and systems around the state are developing this type of training and best practices. The WPLC may be able to utilize these or build upon them.
- Develop training for selectors related to collecting and maintaining a diverse collection.
- Consider practices when engaging in weeding the collection.
- Conduct a diversity audit.
- Consider activities designed to solicit more content from underrepresented voices.
- Develop mechanism or forum for sharing selector and other local reviews of emerging authors.
- Develop a timeline and process for weeding the collection on a more frequent basis.

UPDATE: Project managers are working with OverDrive to complete a full diversity audit. An initial one was completed, however we are working closely with OverDrive to improve data points.

III. Increase buying pool amount for 2022
The COVID-19 pandemic had a significant impact on the discussions around these recommendations. There were two important factors that were discussed and considered for this recommendation:

- The effect of the pandemic on library and system budgets and future funding - will libraries and systems see budget cuts due to the pandemic?
- The increased use of digital collections due to the pandemic.

The WPLC has made great strides in reducing the hold times from 42.79 days in January 2020 to 34 days in January 2021. However, the patron survey shows there are still steps to be made in patron satisfaction.

This past year has seen a great increase in usage to the Wisconsin's Digital Library. 2020 total circulation was 6,999,763, which is a 16% increase from 2019. The pandemic also drove many new users to the collection. When comparing the early 2020 low of 5,465 new users in February to the high of 11,666 in April, there was a 113% increase in new users. Of the over 500 new users who responded to the patron survey, 66% indicated that they accessed the collection for the first time because of library and/or other facility closures related to the COVID-19 pandemic. Looking forward it is likely that monthly checkouts and unique users will continue in an upward trajectory through at least June 2021.

In addition, 44% of respondents who took the staff survey responded that they felt the current buying pool amount was too low. It should also be noted that 42% reported they didn't know if the current budget was too low or too high.

The Collection Development Committee felt the slight increase proposed and approved last year and the growing usage combined with the continued patron dissatisfaction outweighed the concern over future budget cuts caused by the pandemic.

Last year the Collection Development Committee recommended to increase the budget by a fixed amount based on a 5% increase ($66,722) each year for 5 years, beginning in 2021 and to start an evaluation of the increase during 2023 to determine the impact and proposal for the next 5 years. This was approved by the Digital Library Steering Committee in May of 2020 and the Board approved the budget increase for 2021 in June of 2020.

The following activities were identified:
- Increase the 2022 Buying Pool budget by $66,722, approximately a 5% increase.
- Allocate the majority of the increase to fulfilling consortium holds to help decrease wait times and increase patron satisfaction. If needed, allocate a small portion, (no more than 15% of the increase) to Juv/ya materials after an in-depth collection analysis has been completed, as recommended.

UPDATE: In June of 2021, the Board approved an increase of $66,722 for the 2022 buying pool budget. Allocations will be determined once the collection analysis has been completed.