Collection and Advantage Recommendations
of the WPLC Digital Collections Workgroup
October 2017

The Digital Collections Workgroup met in March of 2017 to consider a list of topics and to create a recommendation for the 2018 buying pool.

The identified topics that the Workgroup considered include:
- Non-English Language Materials
- Adult Literacy Materials
- 2018 Buying Pool Amount
- New Vendor Criteria & Consideration of Other Vendors
- Plan for Dealing with Holds and Advantage Collections' Role

A recommendation was made by the workgroup on all topics except the last and this recommendation was accepted by the WPLC Steering Committee in May of 2017. The recommendation included expanding the work of the group to create a best-practices plan for consortium and Advantage selectors. The Workgroup recommended once this research is complete and a plan is created, that the two bodies implement the plan to address the current holds issue and to promote better communication and collaboration among the two bodies.

For the past few months, the Workgroup has been researching and exploring data to better understand the current usage of the collection and to better understand the habits and needs of its patrons.

On October 9, 2017 the Workgroup identified goals for the collection and recommendations to help turn those goals to fruition.

Goals

1. **Clear purchasing guidelines for the shared collection and Advantage**
   Several recommendations have been created to aid in this goal. The workgroup feels it is of utmost importance to provide Advantage selectors with guidelines and responsibilities for the betterment of the overall collection. The recent change to the WPLC buying pool formula which allocates any amount above $1,000,000 to Advantage accounts makes creating guidelines for Advantage selectors even more significant.

2. **Reduction of holds and wait times**
   The recommendations were created to assist in realization of this goal. High holds and long wait times have been a continuous concern for the WPLC. The workgroup agreed creating recommendations to meet this goal were important.

3. **Keep abreast of the variety of changing purchasing models that are available**
Purchasing models can greatly affect budget and demand. Currently, the system offers One Copy/One User (OC/OU), Metered Access by Time, Metered Access by Checkout, and Metered Access by either Time or Checkout. The workgroup identified the importance of exploring and understanding any potential new purchasing models as they could affect the WPLC budget and aid in advocacy with publishers.

4. **Data driven evaluation of the collection**
The Workgroup identified the importance of continuously examining and evaluating the collection with data. The group has looked at data over the past few months to help focus the recommendations. The group feels that not only evaluation of the recommendations, but continuous evaluation of the collection is imperative.

Recommendations
1. **Cap the lifetime number of copies purchased per title.**
   a. **OC/OU will be capped at 80 copies per title.**
   b. **Metered titles will not have a cap.**
   c. **A list of titles that hit the cap will be maintained and sent to Advantage selectors to purchase additional copies if needed.**
   d. **Any capped ebook titles will be limited to a two-week circulation.**
   e. **Selectors will spend out one half of the cap right away for titles that are known best sellers. A change in selector budget to accommodate the high publishing months is recommended.**

   The, life-time spend and annual spend by titles were examined. For annual spend, 2016 was examined. 22,385 titles were purchased in 2016. Of those, there were 25 titles that had a spend of over $2000 per title, six over $3000 and one over $6000. The number of copies for the higher purchased titles was also examined. Because of the varying cost of titles by publisher, it was determined to recommend a cap by copies per title rather than amount spent. Any ebook that reaches the cap of copies purchased will automatically move to a two-week circulation period. For the known best sellers, selectors would spend out half of the cap right away. A change in the selectors budget is recommended in order to accommodate the high publication months. In addition, a list of those titles that have reached the cap will be sent to Advantage selectors so they know it is their responsibility to purchase additional copies if they are needed for their respective systems.

2. **Do not repurchase metered titles that do not have holds.**
   a. **A list of those titles that are not repurchased will be sent to Advantage selectors.**

   No additional funds will be spent on expired metered titles that do not have holds. A list of those titles will be sent to Advantage users on a regular basis to determine if local copies will be purchased.

3. **Purchase more simultaneous use titles.**
   This new feature is cost effective and popular. As this option becomes more available, it is recommended that the WPLC consortium purchase more simultaneous use titles.

4. **Selection and spending for the consortium should focus on bestsellers, preorders, holds and Recommend to Library (RTL).**
    a. **Use RTL as the basis for selection for titles that are not "known entities" or are older.**
    b. **Keep the maximum of three requests per patron per month and the minimum of five recommendations of a title to be purchased.**
    c. **Share RTL lists of titles not purchased with Advantage selectors.**
    d. **Update collection policy section *III. D. Patron Recommended Materials* to include materials may be purchased "regardless of publication date."**

The current focus of the collection was examined and it was determined that the concentration should be on bestsellers, pre-orders, holds and RTLs. It is suggested to use RTL as the basis for selection for titles that are not "known entities" or are older. It is recommended to keep the maximum of three requests per patron per month and the minimum of five recommendations of a title to be purchased. Those RTL lists will be shared with Advantage selectors as well. It is also recommendation that the current collection policy be changed so that titles recommended by five or more patrons can be purchased regardless of publication date.

5. **Investigate the option of OverDrive showing similar titles when an item is unavailable.**
The 2017 patron survey showed that 46% of those surveyed, when confronted with a title with high holds, would place a hold. However, 21% said they would look for other options. The workgroup recommends investigating the option to show similar titles when an item is unavailable, which could increase patron satisfaction, and potentially increase use of other titles.

6. **Include carousel of recently returned and available ebooks and audiobook on Libby.**
To help combat the high holds, the group recommends keeping the recently returned and available carousel of both ebooks and audiobooks prominent on the main page of the Digital Library catalog.

7. **Change "always available" audiobook circulation periods to mirror ebooks.**
The group suggested that loan periods on simultaneous use audiobooks be changed to match ebook loan periods. Because there is no limit to the number of copies available, these titles could be checked out for longer periods.

8. **Advantage Plus Criteria**
In April of 2017 the WPLC Digital Library Steering Committee charged the Collection Workgroup with researching the Advantage Plus Criteria options and making a recommendation. Because the board approved a new formula which allocates any amount above $1,000,000 to Advantage accounts, there should be consistency among the Advantage groups for these options. The group reviewed the options available to Advantage Plus users and make the following recommendations:

- Titles will be shared not moved.
- Titles will not be excluded based on last checkout date.
- Titles with active checkouts and holds will be excluded.
- All formats will be included.
- Metered access by checkout titles will be excluded.
- Titles will not be excluded by their on-sale date.

- Only titles added to the Advantage collection over 30 days ago will be included.
- Preordered titles will not be included.
- The plan will be run automatically.

9. **Revisit all changes in 6 months to determine effect of changes.**
   It is recommended that, if implemented, an evaluation of the changes take place six months after implementation. The evaluation should include an examination of data that reflects spend and usage.