

Report and Recommendations of the Steering Committee's Digital Collections Workgroup April 2018

The Digital Collections Workgroup met on March 15, 2018 to consider a list of topics and to create a recommendation for the 2019 buying pool.

The identified topics that the Workgroup considered included:

- The 2019 buying pool and holds reduction amounts.
- Identification of selection guideline evaluation schedule and discussion of possible accountability of Advantage spending.
- A discussion of the Cost Per Circ lending model.
- The implementation of OverDrive periodicals.
- Default checkout periods.

2019 Buying Pool and Holds Reduction Amount

The Workgroup discussed a number of topics as they considered a buying pool and holds reduction amount. The 2017 recommendations of the workgroup, which were intended to reduce holds and increase patron satisfaction, have only been implemented recently. The impact of these recommendations cannot yet be measured, so it is difficult to recommend an increase at this time. However, the group also discussed the possibility of developing a mechanism for a regular annual increase toward the buying pool or holds reduction amounts. When the original decision was made for the Consortium to move to a \$1,000,000 buying pool amount, that amount was determined based on the wish to have the Consortium buying pool amount reflect approximately 5% of the collection budgets of all public libraries within the state. It could be that a percentage of total collection budget could be established as a threshold for the amount each year. A regular increase could also be based on other factors, such as percentage increase in usage.

RECOMMENDATION: The Workgroup recommends no increase for this year's buying pool and holds reduction amount, keeping the amount at \$1,150,000. In addition, the group recommends discussions about regular increases with the Board and Steering Committee to determine if there is support for such a model within the community and what factors such a model could be based upon.

Selection Guideline Evaluation and Accountability

At the end of 2017, the Collection Development Workgroup made a series of recommendations that focused on the scope of the collection and the relationship of Advantage and Consortium accounts. This resulted in a change of the focus of purchasing for the collection as well as selection guidelines for both the Consortium and Advantage collections. The Workgroup agreed to a six month and annual evaluation of the implemented recommendations and guidelines. Because of this, no additional collection recommendations will be made this year. The possible accountability of Advantage spending and guideline usage was also taken into consideration. In addition to being very difficult to track, it was felt that Advantage selectors will be purchasing titles wanted by their own patrons and some of these may be outside of the guidelines. The group agreed that the guidelines were created for Advantage

accounts to assist the selectors in providing for their patrons. It was decided that if there are any issues with the guidelines or accountability that those would be discovered during the evaluation process and could be examined at that time.

RECOMMENDATION: At this time, there are no additional collection recommendations other than evaluating the recently implemented selection guideline process.

Cost Per Circ Lending Model

Cost Per Circ, or CPC, is a new lending model that OverDrive is offering. The decision to implement CPC is being discussed by both the Board and Digital Library Steering Committee at the upcoming Annual Membership meeting on May 2nd, 2018. The Workgroup was asked to discuss the model and share any thoughts, concerns and potential discussion topics for the joint conversation.

With CPC titles, the Consortium would pay each time a patron borrows a title. CPC titles can be borrowed simultaneously by an unlimited number of users until individual users reach their monthly CPC title limit or the consortium hits the pre-determined monthly CPC budget. CPC content is available for consortia and Advantage accounts. As with content under other lending models, each publisher defines the account type(s) to which their titles can be made available. Titles available in the CPC model are also available in other models as well. If a collection has titles available in both the CPC and one copy/one user lending models, the one copy/one user lending model will circulate first. The Workgroup had concerns about the cost of this new model and whether or not it would be sustainable. It was noted that because the purchasing for CPC is separate within Marketplace, OverDrive's purchasing platform, it is not easy to do a cost comparison for one-copy-one-user and CPC titles and may prove laborious for selectors. The workgroup did identify some questions and data to be discussed at the annual meeting (see the recommendation below).

RECOMMENDATION: The Workgroup recommends the following data be collected for the discussion at the Annual Meeting:

- **A sample list of titles available via CPC.**
- **The intent of OverDrive to move to a true CPC collection (where a collection of titles is available for patrons to borrow) and not just a title-by-title selection model.**
- **For titles already owned in the collection, an average cost per circ.**
- **An average cost for all available CPC titles.**
- **A cost comparison of specific, popular titles with the one copy one user and CPC models.**

OverDrive Periodicals

OverDrive will be offering periodicals once again. The release date is unknown. OverDrive has shared that their magazines are going to work in Libby and through the Wisconsin's Digital Library site, with no additional new app or extra steps. Accessing and reading OverDrive Magazines will be the same as accessing and reading ebooks. It is also unknown if magazines will be available through Advantage.

RECOMMENDATION: The Workgroup wanted to table the discussion and not make a recommendation for implementation until more information is available from OverDrive on periodicals.

Default Checkout Periods

The Digital Library Steering Committee charged the Workgroup with reviewing and making a recommendation for default checkout periods. Currently the default is 7 days. It was asked if the limit should be raised to 14 days.

The Workgroup agreed that Libby has helped with the issue of changing the default as Libby notifies patrons of how long they will have an item before they actually check the item out. A concern about modifying the default to a higher number of days is that if an item is automatically checked out to a patron and isn't downloaded, the item would sit in the patron's account for fourteen or twenty-one days. As it is set now, the item is just checked out for seven days and then will go back into the collection to fulfill holds, as long as the patron hasn't modified their default lending period.

It was suggested that adding a message about default checkout periods to Wisconsin's Digital library during checkout be investigated. The Workgroup also wants to know if there is a way within Libby to modify checkout preferences. Currently, the default checkout period in Libby is the last checkout period selected. In addition, the group wants to know what other consortia are using for their default checkout periods. They would like to suggest to OverDrive to set a separate default number of days for patrons to download an item before it automatically gets returned or provide an email after three days to ask the patron if they still want an item or want to return it. WILS will work on collecting this information from OverDrive.

RECOMMENDATION: Do not increase the default checkout period until the Workgroup receives more information from OverDrive regarding the identified questions.