Ad-Hoc OverDrive Committee Report | 2022

EXECUTIVE SUMMARY

The Ad Hoc OverDrive Committee of the Mid-Hudson Library System's (MHLS) Directors Association (DA) was formed in acknowledgement of the intersection of the increase in use of ebooks and downloadable audiobooks through the OverDrive platform; that some member libraries are struggling to meet demand in this platform; and that purchasing, overall, is behind the pace of other regional library systems.

The Committee believes that all libraries want to be good neighbors but may currently lack the advice and guidance necessary to adequately budget for their OverDrive participation and to develop their collection in a consortium setting.

The Committee discussed the growing use of OverDrive among patrons; the importance of e-books in keeping libraries relevant; the enhancement of the accessibility of library collections thanks to the Libby app; the need to balance demand with costs; the desire to balance print and e-book purchases; collection development and concern about its diversity; a desire to ensure the funding of the collection is being distributed equitably; an interest in data and a belief that metrics provide insight.

The Committee reviewed statistical reports, spending data, DA-approved policies, and purchasing models to identify key findings and corresponding recommendations to share with their colleagues, which are discussed in detail in this report. This report serves as an educational initiative of the DA to help member library directors make more informed decisions.

Key Findings:

- OverDrive circulation continues to trend upwards.
- The current guidelines for purchasing need to be updated and revised to be relevant to OverDrive to ensure equitable participation.
- The increase in an individual library's spending alone does not correlate to reduced wait times for that library.
- Current OverDrive Advantage Account Guidelines do not adequately address issues such as how much individual libraries should be contributing to the shared collection, how funds should be allocated to best meet patrons needs, and how and when Cost per Circ (CPC) titles should be purchased.
- The average wait time on holds in OverDrive has come down by 17.5% in the past year. The reduction in wait times is attributed to:
  - Increased spending by member libraries due to the push to educate more directors and staff about OverDrive Marketplace and e-content collection development.
  - The Reciprocal Lending Agreement (RLA) with the Upper Hudson Library System
  - The ability for libraries with Advantage Accounts to weed and unweed their own collection making it easier for libraries to get what their patrons want.
- Investments in Hoopla are not offsetting demand for OverDrive.
- Available Central Library Program Aid funds should be leveraged to improve the patron experience in OverDrive.
- There is currently no accountability should a library not participate in creating a responsive OverDrive Collection.

Summary of Recommendations:

- *Recommendation 1*: All member libraries are encouraged to attend OverDrive Marketplace training or request a custom Workflow Consultation with MHLS staff on purchasing and collection development in OverDrive Marketplace.

- *Recommendation 2*: At a minimum, member libraries are encouraged to work towards budgeting for and expending funds on OverDrive content at a level that reflects their percentage of OverDrive Circulation..

- *Recommendation 3*: It is recommended that the MHLS Central Library / Collection Development Advisory Committee update the "Mid-Hudson Library System Guidelines for OverDrive Collections Developed with Advantage Plus Accounts."

- *Recommendation 4*: It is recommended that the MHLS Central Library / Collection Development Advisory Committee update the "Mid-Hudson Library System Guidelines for OverDrive Collection Developed with Central Library Development Aid (CLDA) and Central Book Aid (CBA) Funds"

- *Recommendation 5*: OverDrive Marketplace and Collection Development Best Practices, detailed in this report, should be followed.

- *Recommendation 6*: Once the learning curve influenced by this report has had time to take effect, it is recommended that the MHLS Resource Sharing Advisory Committee update the "Approved Procedures for Resource Sharing Standards Violations" to clearly reflect they apply to the OverDrive collection as well as the traditional print and media collections.

- *Recommendation 7*: In recognition of the current lack of equitable access to digital books in the marketplace, the Committee recommends that our system prioritize advocating at the federal and state level for legislation and agreements with publishers that achieve the goal to have library digital book access be at least comparable to library access to print books (e.g. digital titles available for circulation at the same time as general public release, and at reasonable terms, especially with respect to pricing; equitable access for people with disabilities; and fair use rights in the digital age that are at least as robust as these rights in the analog context.)

IDENTIFIED ISSUES RELATED TO THE UNDERFUNDING OF OVERDRIVE

1. Libraries often want to contribute to OverDrive equitably, but don't know how to come up with a fair budget amount.

2. The current guidelines for purchases, found in the "*Mid-Hudson Library System Guidelines for OverDrive Collections Developed with Advantage Plus Accounts*," is seldom triggered for smaller libraries for digital or physical materials.

3. Cost-per-Circ (CPC) titles are being used to meet an individual library's demand but do not build shared collections.

4. Some libraries perceive that an investment in Hoopla takes the place of an investment in OverDrive.

5. Many libraries have not designated or grown staff position capacity to take on this work.

RECOMMENDATIONS

Recommendation 1: All member libraries are encouraged to attend OverDrive Marketplace training or request a custom Workflow Consultation with MHLS staff on purchasing and collection development in OverDrive Marketplace.

> **Why:** Member library usage statistics clearly indicate that OverDrive offers materials that are in demand by patrons, contributes significantly to libraries annual circulation statistics, and should be seen as worthy of assigning staff to take on this work. While users that primarily interact with library resources online may seem invisible to library staff, it is important to acknowledge new usage patterns in our communities.
>
> Since offering increased access to training and consultation for purchasing in the OverDrive Marketplace wait times have been reduced, member libraries have increased their spending, and spending has been done more effectively to meet patron needs.

Recommendation 2: At a minimum, member libraries are encouraged to work towards budgeting for and expending funds on OverDrive content at a level that reflects their percentage of OverDrive Circulation. (A report will be provided to each library.)

> **Why:** Just as each member library is encouraged to match their print purchasing to their patrons' checkouts, the committee agreed that the best metric to use in budgeting for Overdrive purchases was to aim to, at a minimum, match their patrons' usage of Overdrive materials.

Recommendation 3: It is recommended that the MHLS Central Library / Collection Development Advisory Committee update the "Mid-Hudson Library System Guidelines for OverDrive Collections Developed with Advantage Plus Accounts" to:

- Clearly state that a minimum expected investment by each library would be to spend an amount so that the percent of the amount contributed matches the percent of OverDrive circulation by a member library's patrons.
- When a library's number of holds (1-3) is not triggering a purchase, as per the guidelines, to choose items based on overall system-wide demand for an item. It is recommended that libraries in this situation focus on purchasing titles with a consortium ("Cons") holds ratio of 7.0 or higher[1].
- Amend item 5.d to reduce the number of items on a patron's waiting list from 15 to 10.
- Cost-per-Circ (CPC) purchasing model may be used to enhance the collections of libraries who are meeting their percentage of spending obligations.

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[1] The "holds ratio" is the number of patrons waiting per number of purchased copies.

- Update sections with outdated references to OverDrive functionality such as weeding/unweeding and Automatic Hold Checkout.

Ultimately, the ad hoc committee recommends that the Central Library/Collection Development Advisory Committee consider the transfer of the guidelines to the Resource Sharing Advisory Committee for long-term inclusion in the Resource Sharing Standards approved by the DA.

> **Why:** These new and updated guidelines would provide clear collection development best practices for each library to follow, which members of the committee felt were needed to help guide purchasing decisions.

Recommendation 4: It is recommended that the MHLS Central Library / Collection Development Advisory Committee update the "Mid-Hudson Library System Guidelines for OverDrive Collection Developed with Central Library Development Aid (CLDA) and Central Book Aid (CBA) Funds" to:

- Acknowledge that CLDA and CBA funds have been merged into one aid category: "Central Library Services Aid"
- Take advantage of the proposed regulatory updates that will allow for fiction, in addition to non-fiction, titles to be purchased with these funds.

> **Why:** to enhance the purchasing power of member libraries in meeting proven demand that isn't triggering purchase by individual libraries

Recommendation 5: OverDrive Marketplace and Collection Development Best Practices, detailed below, should be followed.

> **Why:** Discussions at the county level indicated that a lack of education on these topics and therefore lack of awareness of what to purchase with limited funds is a barrier to purchasing OverDrive titles. In addition, many libraries do not have more than one or two holds on a particular item, allowing them to feel that they do not need to purchase these titles, since the recommendation is to purchase a copy when there are 4-7 holds on an individual title. Investing funds at the level recommended above will require more thought than just the local holds threshold.

Recommendation 6: Once the learning curve influenced by this report has had time to take effect, it is recommended that the MHLS Resource Sharing Advisory Committee update the "Approved Procedures for Resource Sharing Standards Violations" to clearly reflect they apply to the OverDrive collection as well as the traditional print and media collections.

> **Why:** Since OverDrive is a shared collection and the lack of financial participation by libraries whose patrons benefit from access to it affects the experience of all 66-member libraries' users, committee members felt there needed to be accountability when guidelines are not being followed.

Recommendation 7: In recognition of the current lack of equitable access to digital books in the marketplace, the Committee recommends that our system prioritize advocating at the federal and state level for legislation and agreements with publishers that achieve the goal to have library digital book access be at least comparable to library access to print books (e.g. digital titles available for circulation at the same time as general public release, and at reasonable terms, especially with respect to pricing; equitable access for people with disabilities; and fair use rights in the digital age that are at least as robust as these rights in the analog context.)

Why: "The fundamental mission of libraries is to provide access to information, regardless of content or format, to everyone. Digital resources and services, or resources and services made primarily available online or on digital devices, are integral to libraries' mission in the twenty-first century. Libraries are important points of access to many digital resources and services, including, but not limited to, computers, the Internet, and digital resources and tools. In order to provide access to digital resources and services while upholding the Library Bill of Rights, libraries must consider intellectual freedom principles and issues of equity to ensure that access to information is enhanced, not restricted, by digital technology." -Access to Digital Resources and Services: An Interpretation of the Library Bill of Rights, American Library Association

BEST PRACTICES

A. **OverDrive Marketplace**
   1. Member libraries should follow the advice found in the MHLS-supplied document "Operational/Management Functions of OverDrive Marketplace."
   2. Advice from the Committee on Managing Holds:
      a. Every two weeks, review holds for your patrons and place small orders as appropriate. Don't let holds pile up for ordering once a month or less.
      b. Anticipate demand for bestsellers/future best-sellers. Consider purchasing titles that are likely to reach the recommended thresholds before the number of patron holds demands it. Watch for books being made into movies or series; "Books of the Week" feature in People magazine; and Book Riot newsletters.
      c. Take system-wide holds ratio into account when choosing what to purchase.
      d. Purchase multiple copies as recommended when the number of Advantage holds exceeds 7.
   3. Use the Automated Carts features to regularly generate carts based on criteria you specify to facilitate collection development. Options are available for managing holds, for managing *Recommend to Library* suggestions, and to build carts for particular authors, series, or from specific book review sources (Smart Lists). OverDrive will automatically generate 2 carts each week of metered titles about to expire from your Advantage collection; assess whether or not your patrons want these items before re-purchasing them.

B. **Collection Development**
   i. Patron-initiated "recommended titles" can be used to enhance an Advantage collection as funding allows, but should not take priority over the need for multiple copies of titles with a large number of system-wide holds.

   ii. Consider pricing models in order to maximize available copies to meet demand. For example, purchasing two lower-priced, shorter-term (12-month) copies rather than one, higher-priced longer-term (24-month or one copy, one use) item.

   iii. Consult bestseller lists, book reviews, and/or the "Must haves" section of OverDrive Marketplace to find high-quality and in-demand titles.

   iv. To assist libraries just getting started with OverDrive Collection Development and low patron engagement, MHLS will provide "top tier categories" to reflect the categories with the highest OverDrive

Circulation.

v. Libraries are applauded for having Hoopla, however the committee's findings indicate that it does not meet patrons' need for high demand items in OverDrive. Hoopla is nearly universally subscribed to by all libraries yet has not alleviated the issues the Committee has identified in OverDrive. This is due to the facts that:

1. Many items patrons place holds on in OverDrive are not available in Hoopla.
2. Some high demand hold items that are available in Hoopla are not in a format that some users can access (e.g. Hoopla does not allow for reading on Kindle Paperwhite).
3. Since Hoopla is available only to the subscribing library's patrons, it should not be seen as a substitute for contributing to a shared OverDrive collection.

CONCLUSION

With the continued growth in OverDrive usage by MHLS patrons coupled with a lack of adequate spending by the majority of libraries within the system to keep up with increasing demand, the Ad-Hoc Overdrive Committee recommends each library attend OverDrive training regularly; aim to budget funds to adequately support their patrons' usage; update the *Mid-Hudson Library System Guidelines for OverDrive Collections Developed with Advantage Plus Account*s, the *Approved Procedures for Resource Sharing Standards Violations;* and the *Mid-Hudson Library System Guidelines for OverDrive Collection Developed with Central Library Development Aid (CLDA) and Central Book Aid (CBA) Funds* to reflect the changes proposed in this document; and use the Best Practices suggested by committee members when choosing titles to purchase. By following these recommendations, the committee hopes to both make the financial contributions equitable among all MHLS libraries and enhance our patrons' experience with OverDrive.

A. Committee Origin

This ad hoc committee was formed through a vote of the MHLS Directors Association (DA) in April 2022. This issue was presented as follows:

*"**Background:** Use of e-books and downloadable audiobooks is increasing, and some member libraries are struggling to meet demand in our system as well as lagging behind other regional library systems in building digital collections.*

***Issue:** Current guidelines for purchases seldom triggered for smaller libraries, for digital or physical materials. Cost-per-circ titles do not build shared collections but do meet demand for purchasing libraries. Because of nonfiction purchases with Central Library Aid Program funds, this issue spans committees. Input from libraries of various sizes is needed to come up with an equitable, workable strategy.*

***Recommendation:** Create an ad hoc committee, with representation across the advisory committees and counties, to develop a recommended strategy, which may include a survey of member library directors, on purchasing standards for both digital and e-resources."*

B. Committee Roster:

- Columbia County
    - Tamara Gaskell, Roeliff Jansen Community Library
        - Chair of the Columbia County Library Association
        - Member, Resource Sharing Advisory Committee
    - Matthew Pavloff, Kinderhook Memorial Library
    - Tobi Farley, Philmont Public Library
        - Member, Central Library/Collection Development Advisory Committee
- Dutchess
    - Carol Fortier, Beekman Library
        - Chair, Dutchess County Director Association
    - Carol Bancroft, Clinton Community Library
        - Member, Resource Sharing Advisory Committee
    - Donna Perolli, Dover Plains Library
    - Mary De Bellis, LaGrange Library
        - Member, System Services Advisory Committee
    - Courtney Tsahalis, Millbrook Library
        - Member, Central Library/Collection Development Advisory Committee
    - Daniela Pulice, Pleasant Valley Free Library
        - Member, Central Library/Collection Development Advisory Committee
- Greene
    - Caroline Ford, Catskill Public Library

- o Catherine Benson, Heermance Memorial Library (Coxsackie)
    - ▪ Vice President, Greene County Library Association
    - ▪ Member, System Services Advisory Committee
    - ▪ Member, Central Library/Collection Development Advisory Committee
  - o Jen Grounds, Library Assistant, Heermance Memorial Library (Coxsackie)
- ● Putnam
  - o Michele Capozzella , Mahopac Library
    - ▪ Chair, System Services Advisory Committee
  - o Laura Crisci, Head of Emerging Technologies, Mahopac Library
  - o Stephanie Harrison, Patterson Library
    - ▪ Chair, Ad Hoc OverDrive Committee
    - ▪ Chair, Putnam County Library Association
    - ▪ Chair, Central Library/Collection Development Advisory Committee
- ● Ulster
  - o Julie Kelsall-Dempsey, Highland Public Library
    - ▪ Member, System Services Advisory Committee
  - o Gillian Murphy, Elting Memorial Library (New Paltz)
    - ▪ Member, Resource Sharing Advisory Committee
  - o Katie Scott-Childress, Rosendale Library
    - ▪ Member, Central Library/Collection Development Advisory Committee

C. **Ad Hoc OverDrive Committee Resources page:** https://kb.midhudson.org/overdrive-ad-hoc-committee-resources/