

Tip: Check Weekly

- If you're ordering materials regularly, you should also regularly check holds.
- Many libraries purchase holds on Fridays to give patrons more copies for the weekend.

Tip: Choose the cheaper lending model.

- If there is a choice between 24 months and 12 months, choose 12 months. This way, you can buy 2 copies for the price of one 24 month.
- For titles with an OC/OU option, it's often best to purchase one copy in the OC/OU lending model, but then fill holds with the less expensive or alternative lending model(s) where possible.

Tip: Set Up a Holds Manager Plan

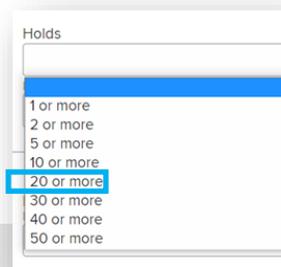
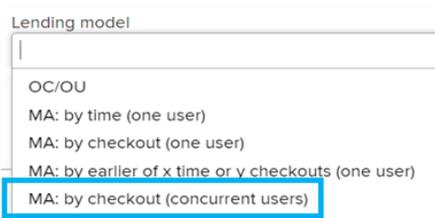
- The Training Team has detailed the process here:
<https://resources.overdrive.com/create-a-hold-manager-plan-in-overdrive-marketplace/>
- Don't be afraid to experiment with holds ratios.
- A good holds ratio is generally anything under 10:1, but set it where you feel comfortable.
- Once you set up a holds manager plan, use the 'run now' feature to see how many titles the plan pulls and how much the cart will cost. You're then free to adjust numbers to your comfort level within the cart.

Tip: Use OverDrive MAX/MACU- Metered Access Concurrent Use Lending Model

Titles in this lending model allow 100 checkouts concurrently, so they can fill 100 holds at a time. This lending model is perfect for book clubs, popular titles, and titles with a large holds list. A best practice is to own the title in OC/OU or MA by time/checkout and then add the OverDrive Max lending model.

To Find MACU titles with holds:

1. Click advanced search
2. In the 'lending model' search field, select MA: by checkout (concurrent use)
3. In the 'holds' search field, use '20 or more' as a base. Feel free to adjust to your comfort level.
4. Run the search and choose which titles to purchase

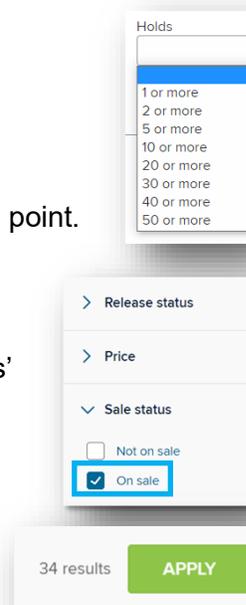


Tip: Shop Holds on Sale

OverDrive has new sales every month. Make sure you are buying titles you have on hold when they are discounted. The best way to see all holds that are on sale is as follows:

To find titles with holds that are on sale:

1. Open an advanced search.
2. In the holds search field, choose your holds starting point.
3. Run the search.
4. On the left hand side search filters, click 'sale status'
5. Select 'on sale' then click the green 'apply' button



6. Start shopping! You can now buy more copies of sale titles and save some money while filling holds.

Tip: Use the Cost per Circ (CPC) Lending Model

Set a monthly budget and then choose individual titles to offer as CPC. You are only charged after a patron checks a title out and are invoiced once a month for the usage.

Learn more here: <https://resources.overdrive.com/cost-per-circ/>

There are 2 approaches to filling holds with CPC:

Option 1: Set a budget and add several titles at once

PROS: you can potentially fill holds on many titles at once. Holds are released in order of when the hold was placed, so titles with older holds will have copies released to those patrons first.

CONS: It may only fulfill a few holds on each title depending on how many titles are added as CPC and how much budget is available.

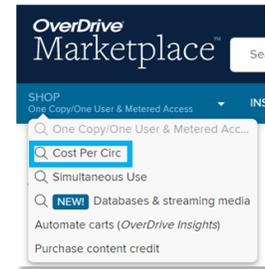
Option 2: Add 1 title in ebook and 1 in audio, using a holds cost calculation to set a budget

PROS: You can calculate exactly how much money to spend by multiplying the number of holds you want to fill with the cost of the title per circ. Add that number to the monthly budget and set the title live to fill that many holds.

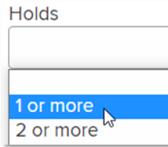
CONS: You must add titles over a period of time and be strategic. It can be time intensive.

How to use CPC titles to fill holds:

1. Navigate to the CPC shopping area through the SHOP tab in Marketplace
2. Depending on how you want to fill holds, either set a monthly budget first (if option 1 is your choice) or wait to set the budget until you know how much it will cost to fill holds on a title (if you prefer option 2).



3. Open an advanced search.



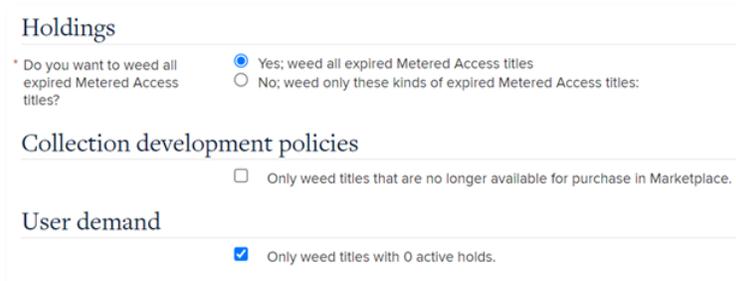
4. In the holds search field, choose 1 or more holds.
5. Best practice is to select a maximum price per circ to narrow down the options and be more cost effective (try \$1 as the max to start and take care of some low-cost holds). Then run the search.
6. Select the titles to 'Add CPC Title'.
7. You can schedule a date to revoke the title once you've clicked on 'Add CPC Title'. If you are choosing Option 2, we suggest you choose a day or two after you've added that title to have it automatically turn off. If you are choosing Option 1, it's still a good idea to have these titles automatically revoke before the end of the month so you don't start spending next month's budget on them.
8. If you want to add more money to your budget during the month you will need to add the amount you will spend per title to the amount you've already spent in the budget area. Example: You had a \$500 budget. You now want to add another \$50. Your monthly budget will become \$550. This is especially important for Option 2 users as you will have to add on the amount per title you're filling holds on to the monthly budget.

9. You can revoke all titles at any point in time by choosing 'Revoke all CPC titles' on the left side of the screen in the CPC area.



Tip: Make Your Weeding Plan Work for You

Do you have an automatic weeding plan set up? If not, patrons could be placing holds on titles that have expired and are no longer available for sale. You can choose to only weed titles that are no longer available for sale that are in metered access and have no holds.



If you decide not to repurchase metered titles when they expire, set the plan to weed out expired MA titles without holds.

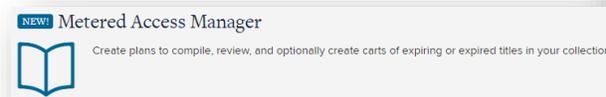
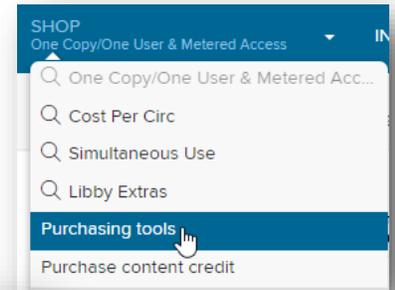
Expired titles with holds that were placed in the last 90 days will count against your current average waiting period. If you're willing to repurchase MA titles that patrons have on hold, see the next tip for repurchasing expired titles on hold.

Tip: Repurchase Expired Titles That Are on Hold

Expired titles with holds can be easily identified using the Metered Access Manager tool.

Create a Metered Access Manager Plan to Identify Expired titles on Hold:

1. Under the SHOP drop-down, select Purchasing Tools
2. Select Metered Access Manager
3. Click Create new plan
4. Name the Plan
5. Leave all MA lending models selected
6. Unselect the button next to Expiring titles
7. Select the button next to Expired titles
8. Set any other desired collection development policies (optional)
9. Under Circulation activity, set the minimum number of active holds to 1 to capture any title with a hold, or to the minimum desired number of holds
10. Any time the plan is opened, it will run and provide up to date data, but by selecting “yes” next to “Do you want to generate carts automatically?”, the plan can also be run on a regular, automated basis creating a cart for review.
11. If automatic carts are preferred, set the desired recurrence (optional)



* Plan name

* Which Metered Access lending models should be included?

- MA: by checkout (one user)
- MA: by checkout (concurrent users)
- MA: by time (one user)
- MA: by earlier of checkouts or time (one user)

* Which title statuses should be included?

- Expiring titles
- Expired titles

Circulation activity

Active holds

Minimum Maximum

Automate carts

* Do you want to generate carts automatically?

Yes
 No

Note that the number of titles that meet criteria can change between the time the cart is created and when you review it.

* How often do you want a cart created?

If you select twice a month, this plan will run on the 5th and 20th of each month.

* When do you want to generate a cart for the first time?

Select a future date (tomorrow or later).

Cart name

If desired, please enter an internal purchase order ID

TIPS:

You can open, edit, or delete plans at any time and can create different plans based on audience, format, and other criteria

If you decide to not repurchase a title that's expired and on hold, we suggest:

weeding the title (under the admin tab – weeding)

and

canceling its holds (under the support tab – manage holds)

Tip: For Consortium Members, Use Advantage Plus Sharing

Are you part of a consortium? Great! Make sure you are using Advantage Sharing. This allows advantage libraries to share titles purchased at the advantage level with the consortium.

- The Training Team has a great overview of Advantage Plus Sharing Here: <https://resources.overdrive.com/advantage-plus/>
- Patrons at a sharing advantage library still get priority on those titles, even after shared to the consortium.
- Sharing means more copies available to help fill holds at the consortium level.
- Titles that aren't circulating at the advantage level will get new life when checked out by patrons at other member libraries.