

Best Practices to Transform Your OverDrive Consortium

Audience:

Consortium leaders/admin and
collection development staff



Housekeeping



Recording

This session will be available on-demand.



Zoom tools

You can use Q&A and Live transcript.



Follow-up

You will receive the recording, PDF of the presentation, and best practices guide.

Our speakers



Lauren Bajda

Product Trainer
OverDrive



Holly Kabat

Account Manager
OverDrive

Our speakers



Daniel Berra

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Pflugerville Public Library
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Materials Selector
Carroll County Public Library
Maryland's Digital Library



Joan Kranich

Library App. Manager
CW MARS

OverDrive Consortium

- Consortium
- Advantage



Agenda

01 Best Practices

03 Resources

02 Success Stories

04 Q&A



01

Best Practices

Tips to maximize
participation and
circulation.



Best Practices

1. Administrative

- a. Marketplace logins
- b. Sign up for emails
- c. Subscribe to the blog

2. Collection Development

- a. Decide on management
- b. Set purchasing policies
- c. Curate collections regularly
- d. Set policies on metered access management, weeding, etc.



Best Practices

3. Connect

- a. Set up an email listserv
- b. Schedule regular meetings
- c. Share contact info for OverDrive team

4. Success

- a. Identify goals and define how to measure success
- b. Track and discuss progress
- c. Participate in regular staff training
- d. Create a marketing plan



How OverDrive Can Help

Best resource at OverDrive is your Account Team!

- **Account Manager:** Provide data, advise on big picture, help meet goals.
- **Content Specialist:** Create carts, assist with Collection Development, and all things content.
- **Product Support Specialist:** Assist with metered access management, holds moves/removal, MARC records, weeding.

Your Account Manager



Rob Rando
(216) 573-6886 x 1399
rrando@overdrive.com

“ ”

I can help with any questions, requests, or feedback about your OverDrive service.

Your Account Team

We're also here to help with your digital collection. Contact us any time!



Jane Whitehurst
Content Specialist

(216) 573-6886 x 1316
jwhitehurst@overdrive.com



Whit Arnold
Product Support Specialist

(216) 573-6886 x 1438
warnold@overdrive.com

02

Success Stories

Real-world examples
from four libraries.



CLEVNET

Purchasing managed by
OverDrive Content Specialist.



OverDriveMarketplace™

FIND PROMOTIONAL RESOURCES

Search OC/OU & MA by title, author, series, or publisher

Q

Advanced search

CARTS

No pinned carts
+ Create cart

Holly Kabat - CLEUNET (OH)

Settings

SHOP
One Copy/One User & Metered Access

INSIGHTS

ADMIN

CURATE

NEWS

BILLING

SUPPORT

FEATURED

GET HELP

Must-haves

exp holds 0 checkout

exp holds 0 days

All saved searches

Insights

OverDrive's top authors
See what you're missing

Top 200 series search
See gaps in series you offer

Top 200 adult titles
Not in your collection

Top 200 YA titles
Not in your collection

Top 200 juvenile titles
Not in your collection

SEE PRE-ORDERS

John
Ciose
creativity

A short
and cheerful

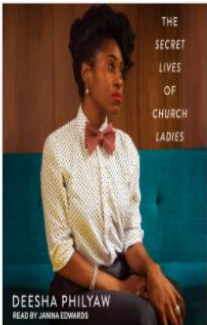
KAY
DOPE!
CURSE
OF
ALIEN

CRAFT & COOKING SALE

Shop savings stewed
with titles on sale up
through November 1

University Press Week 2021

THE
SECRET
LIVES
OF
CHURCH
LADIES




DEESHA PHILYAW
READ BY JHANNA EDWARDS

ADD TO NEW CART

The Secret Lives of Church...

Deesha Philyaw, et al.

\$34.95

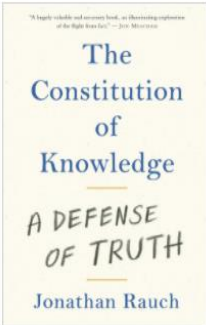
 Audiobook

"An insightful and accessible book, an illuminating exploration of the Black church." — Jari McManis

The
Constitution
of
Knowledge

A DEFENSE
OF TRUTH

Jonathan Rauch




ADD TO NEW CART

The Constitution of Knowl...

A Defense of Truth
Jonathan Rauch

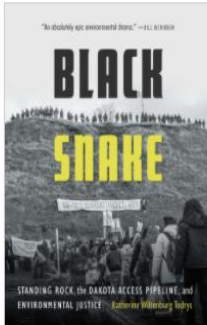
\$55.99

 Ebook

"An absolutely epic environmental drama." — Bill Koppelman

BLACK
SNAKE

STANDING ROCK, the DAKOTA ACCESS PIPELINE, and
ENVIRONMENTAL JUSTICE Katherine Wiltenburg Todrys




ADD TO NEW CART

Black Snake

Standing Rock, the Dakota Access...
Katherine Wiltenburg Todrys

\$24.95

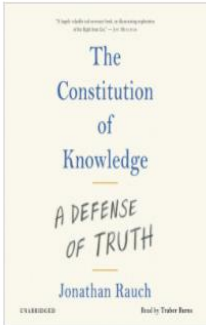
 Ebook

"Thought-provoking and accessible, an essential exploration of the Black church." — Jari McManis

The
Constitution
of
Knowledge

A DEFENSE
OF TRUTH

Jonathan Rauch




ADD TO NEW CART

The Constitution of Knowl...

A Defense of Truth
Jonathan Rauch, et al.

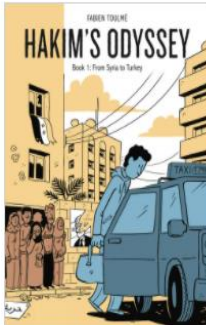
\$64.95

 Audiobook

FABRIEN TOULMÉ

HAKIM'S ODYSSEY

Book 1: From Syria to Turkey




ADD TO NEW CART

Hakim's Odyssey

Book 1: From Syria to Turkey
Fabien Toulmé, et al.

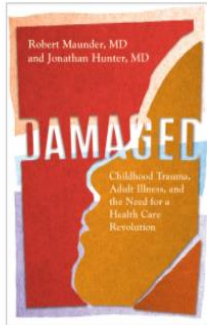
\$41.99

 Ebook

Robert Maunder, MD
and Jonathan Hunter, MD

DAMAGED

Childhood Trauma, Adult Illness, and
the Need for a Health Care
Revolution




ADD TO NEW CART

Damaged

Childhood Trauma, Adult Illness,...
Robert Maunder, et al.

\$29.95

 Ebook



Insights - Automate Carts

Holds Manager



At your website, demand builds as your users place titles on hold. Holds Manager lets you respond to user demand quickly and easily by automating orders based on holds.

Every time a Holds Manager plan runs, you can have it create a cart for your review. Or, Holds Manager can automatically place a holds-driven order on your behalf.

You can edit these plans at any time.

RTL (Recommend to Library) Manager



Let your users help with collection development. Manually or automatically purchase the titles most recommended by your users.

Smart Lists



As a collection development expert, you know there are titles that you are certain to order. Smart Lists automatically build carts based on criteria you specify, saving you time while honoring your Library's collection development policies and budget.

You can also create a Smart List to manage purchasing for your Metered Access content. This way, you can ensure that Metered Access titles are repurchased before they expire (as desired), guaranteeing continued access for your users.

Every time a Smart List runs, it will create a cart for your review (and you'll receive an email letting you know it's ready).

You can edit Smart Lists at any time.

Carts

+ CREATE CART

COPY/MERGE CART(S)

CREATE WORKSHEET

X DELETE CART(S)

Pinned carts

Select all

Other carts

Sort by:

Name

CLEVNET 20+ Holds	OD RTL 3:1	OD Weekly Holds 6:1	Top eBook Titles Nov	Top eBook Titles Oct	Top eBook Titles Q3
Need Kindle Run Nov 9 Cart Type: Select List 502 standard units TBD Payable at checkout 6 preorder units TBD Payable on the street date(s) of preorder title(s) Last edited on 11/9/2021 by Patricia Lowrey	OD RTL 3:1 Cart Type: RTL Manager 41 standard units TBD Last edited on 11/12/2021 by Todd Warhola	OD Weekly Holds 6:1 Cart Type: Holds Manager (HSOP) 279 standard units TBD Last edited on 11/12/2021 by OverDrive Administrator	Check for Kindle Cart Type: Select List 136 standard units TBD Payable at checkout 162 preorder units TBD Payable on the street date(s) of preorder title(s) Last edited on 10/26/2021 by Patricia Lowrey	Check for Kindle Cart Type: Select List 25 standard units TBD Payable at checkout 15 preorder units TBD Payable on the street date(s) of preorder title(s) Last edited on 11/11/2021 by Patricia Lowrey	Still Need Kindle Cart Type: Select List 40 standard units TBD Payable at checkout 2 preorder units \$46.99 (Est.) Payable on the street date(s) of preorder title(s) Last edited on 11/9/2021 by Patricia Lowrey
PURCHASE	PURCHASE	PURCHASE	PURCHASE	PURCHASE	PURCHASE

+ CREATE CART

COPY/MERGE CART(S)

CREATE WORKSHEET

X DELETE CART(S)

Standard units total: 1BD

Cart ID#	7437216	Standard units	41
Cart type	RTL Manager	Standard titles	41
Last edited	11/12/2021 by Todd Warhola	Standard total	TBD
Total units	41	Preorder units	0
Total titles	41	Preorder titles	0
Holds	899 / 898	Preorder total	\$0.00

[EDIT CART](#)
[CREATE WORKSHEET](#)
[COPY TITLE\(S\)](#)
[MOVE TITLE\(S\)](#)
[DELETE TITLE\(S\)](#)

Set all titles to copies [UPDATE](#)(# / # = cons. / all adv) [Sort by](#)

Some titles in this cart are available in more than one lending model (rows are shaded in yellow). You can choose a lending model for each title below.

Note: You can also do this later by clicking the Select link in the "Lending model" column next to each applicable title.

Notes:

For standalone libraries: "Total checkouts" is the sum of all checkouts of this title by your end users.

For members of consortia: "Total checkouts" is the sum of all checkouts of consortium copies of this title by any members of your consortium.

Total checkouts and latest checkout are updated nightly.

*Checkouts remaining" is the number of checkouts remaining for your MA (Metered Access) units, if those units are metered by checkout.

Adding and removing columns

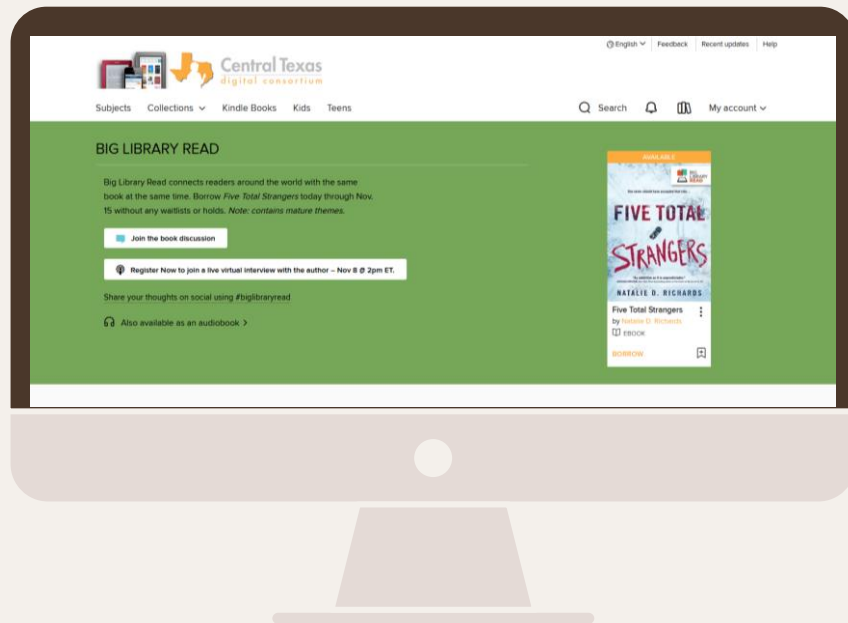
You can add or remove columns in your carts at any time. To add or remove columns, click **Add/remove columns** below, then click the button(s) for the column(s) you would like to add or remove. Blue buttons are active columns and white buttons are columns that have been removed.[ADD/REMOVE COLUMNS](#)

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		On sale	Street	First copy bought	Last copy expires	Cons MA *	Adv MA	Cons checkouts remaining	Adv checkouts remaining	Cons OC/OU	Adv OC/OU	C... SU	A... SU	C... C...	A... C...	Adv Plus Shared	Total check...	Adv checkouts	Cons holds	Adv holds	Total recommendations	Adv recommendations	Latest Chec...																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																							

Central Texas Digital Consortium

Sharing what we've learned:

- Steering Committee
- Consortium pool/Monthly orders
- Collection development/Challenged materials



Steering Committee

Sucesces

- Addressing wait times
- Polling member needs
- Point of contact
- Better communication



Challenges

- Getting involvement from smaller libraries
- Balancing needs of libraries of different size
- Lack of control over consortium size
- Getting everyone to spend content credit

Consortium Pool/Monthly Orders

Pool of Funds

Our consortium pool of funds allows libraries to contribute content credit to be used on orders placed by Overdrive on our behalf each month.

Overdrive Orders

Our Overdrive collection rep places monthly orders to help address long wait times.



Wait times have decreased from over 45 days to 28-30 days.

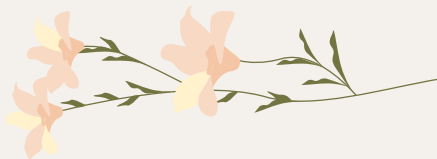
Collection Development

Collection Policy

- Individual libraries vs. Consortium wide
- Tool to assist individual libraries with orders

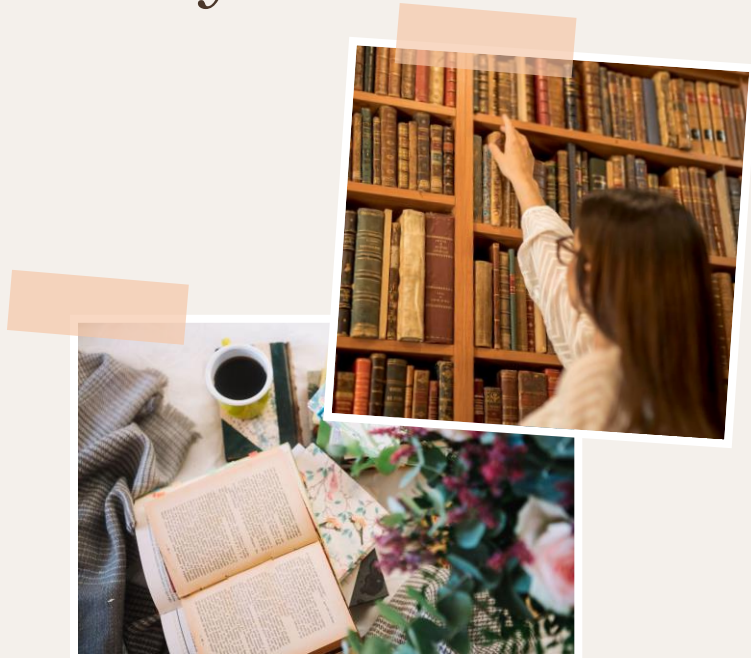
Challenged Materials

Is there ever a case where one library could remove an item another library purchased for the consortium?



Maryland's Digital eLibrary Consortium

- Group of **TEN** Maryland Library systems
- Consortium and Advantage selection.
- Consortium utilizes an Automatic **Holds** plan for Titles available for sale in Marketplace



Holds that never go away!

What happens to titles that are no longer available for sale in Marketplace? (**NFS**)

2 kinds of **NFS** titles

1) Single OC/OU
still available to customers

2) **NFS**
+ **Metered** (expired)

+ **Holds**



Customer satisfaction (and clutter!)





Best Practices

NFS titles + Expired + Holds

Delete the holds and weed the titles??

. . . Or?

OverDrive sends us a COLOR-CODED Excel spread sheet

Quarterly Excel Reports

Cross Ref ID	Title	Creator	Subject	Publisher	Audience	Date added to site	Format	Total checkouts	Latest checkout	Current holds
510735	Cujo	Stephen King	Fiction	First Second	Adult fiction	4/12/2017	Ebook	217	1/2/2021	12
268353	At Home in Stone	Linda Lael Miller	Fiction, R	HQN Books	Adult Fiction	7/2/2015	Ebook	52	6/14/2017	1
2637693	Berlin Red: Inspector	Sam Eastland	Fiction, M	Faber & Faber	Adult Fiction	5/31/2016	Ebook	39	1/12/2018	1
2192132	Betrayed by Love	Diana Palmer	Fiction, R	Harlequin	Adult Fiction	2/5/2016	Ebook	26	9/3/2016	2
2035932	Big Sky Country	Linda Lael Miller	Fiction, R	HQN Books	Adult Fiction	4/30/2015	Ebook	26	4/9/2016	1
3970870	Blood Oath: Alex	Linda Fairstein	Fiction, M	Penguin Publishing	Adult Fiction	2/1/2019	Ebook	416	3/19/2021	1
550907	Brave Young Knight	Karen Kingsbury	Juvenile F	Zonderkidz	Juvenile Fiction	12/7/2011	Ebook	104	6/5/2018	3
4171978	Captive Star	Nora Roberts	Fiction, R	Silhouette	Adult Fiction	10/25/2018	Ebook	130	3/15/2021	6
2188651	Christmas on Car	Sheila Roberts	Fiction, R	MIRA Books	Adult Fiction	12/1/2016	Ebook	154	4/21/2020	9
4538729	Cracking the SAT	The Princeton Review	Nonfiction	Random House	Adult Nonfiction	5/28/2020	Ebook	14	5/12/2021	6
261101	The Devil's Necktie	Kat Martin	Fiction, H	MIRA	Adult Fiction	7/2/2015	Ebook	52	6/20/2017	2
1688936	The Empty Throne	Bernard Cornwell	Fiction, H	HarperCollins	Adult Fiction	2/13/2015	Ebook	179	10/7/2019	9
541828	The Fairest Town	Karen Poeth	Beginning	Zonderkidz	Juvenile Fiction	8/29/2013	Ebook	215	7/14/2020	4
1778362	The Girl of His Dreams	Susan Mallery	Fiction, R	HQN Books	Adult Fiction	11/26/2014	Ebook	699	11/25/2019	11
2399241	Holly and Mistletoe	Susan Mallery	Fiction, R	HQN Books	Adult Fiction	11/10/2015	Ebook	316	8/14/2020	2
246286	Influence: The Power	Robert B. Cialdini	Nonfiction	HarperCollins	Adult Nonfiction	5/28/2014	Ebook	342	9/21/2020	48
3072710	Informed Risk	Robyn Carr	Fiction, L	MIRA Books	Adult Fiction	5/25/2017	Ebook	546	7/15/2021	21
2085034	The Last Summer	Pam Jenoff	Fiction, H	MIRA Books	Adult Fiction	6/25/2018	Ebook	26	8/3/2019	1
346249	Leaving Cheyenne	Larry McMurtry	Fiction, L	Simon & Schuster	Adult Fiction	4/25/2017	Ebook	16	4/21/2018	3
3695384	The Man You'll Meet	Debbie Macomber	Fiction, L	MIRA Books	Adult Fiction	11/30/2018	Ebook	26	7/21/2019	2
217474	Montana Creeds: The	Linda Lael Miller	Fiction, R	HQN Books	Adult Fiction	7/2/2015	Ebook	52	2/24/2018	2
1446342	Moonshot: The First	Brian Floca	History, J	Atheneum Books	Juvenile Nonfiction	6/11/2015	Ebook	12	2/17/2018	2
2084832	Never Always Sorry	Adi Alsaid	Teen, Young	Harlequin	Young Adult Fiction	1/19/2016	Ebook	78	8/24/2017	6
3900608	On the Mountain Ray	Bentley, Br	Fiction, L	Salem Books	Adult Fiction	6/18/2018	Ebook	6	4/29/2019	1
2143266	The Peanuts Movie	Charles M. Schulz	Comic	Simon Spotlight	Juvenile Fiction	9/13/2015	Ebook	268	1/6/2020	7
470016	Pregnancy, Childbirth	Janet Walley	Family &	Meadowbrook	Adult Nonfiction	3/6/2014	Ebook	8	2/21/2015	7

Spread Sheet colors explained



No
new version

- Remove holds
- Weed from collection



New version
owned

- Transfer holds to new owned version
- Weed the blue from collection



New version
available to
purchase

- Make your selection to purchase (or not)



New (different version)
available to purchase

- Make your selection to purchase (or not)



Next steps:



- **New** available versions are in your cart in Marketplace
- **Buy** the titles you want
- **Inform** OverDrive
- OverDrive rep will **transfer** holds on titles purchased
- OverDrive will **remove** holds from those not purchased and weed the titles from site

Numbers!

Average # Titles on Quarterly report:

35 - 50

Average # Holds Quarterly report:

100 - 150





Examples/Recently purchased

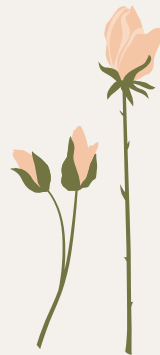
- New versions of perennial favorite Stephen King titles
- ***First Impressions*** by Nora Roberts.
34 holds have now grown to 109!



C/W MARS Advantage Plus Sharing

User demand - C/W MARS includes all titles except preorders

- Do you want to exclude titles based on their latest checkout date?
 - **No; include all titles.**
- Do you want to exclude titles with active checkouts?
 - **No; include all titles.**
- Do you want to exclude titles with active holds?
 - **No; include all titles.**



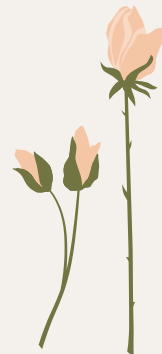
C/W MARS Advantage Plus Sharing

Collection development policies -

All lending models are shared after one month except Cost Per Circ and Subscriptions

- Do you want to include all formats?
 - **Yes; include all formats.**
- Do you want to include all lending models?
 - **Yes; include all lending models.**
- Do you want to include titles based on their on-sale-date?
 - **No; include all titles.**
- Do you want to include titles based on their date added to the Advantage collection?
 - **Yes, include only titles added to the Adv.collection Over one month ago.**
- Do you want to include preorder titles?
 - **No.**

Scheduling - Run automatically twice a month



C/W MARS Advantage Plus Sharing

Results

- Started sharing by default on 10/20/2020
 - 35 libraries that did not have a sharing plan were set to share
 - 57 libraries had sharing plans in place
 - 104 libraries sharing as of today
-
- C/W MARS OverDrive budget: **\$510,000**
 - C/W MARS Advantage libraries spent **\$714,520.50** on content shared with the consortium
 - FY2021 we saw a **37.8% increase** in OverDrive circulation over FY2020. Our total checkouts on our OverDrive collection were over 1.9M.



C/W MARS Advantage Plus Sharing

Results

- **How it's helped**
 - filling holds on titles the consortium does not own
 - filling holds of very popular titles that the consortium owns but cannot meet the holds ratio efficiently,
 - creating more variety in the content available,
 - consortium purchases based on patron demand including titles requested by libraries



C/W MARS Advantage Plus Sharing

Why?

C/W MARS libraries share!

C/W MARS: Central/Western Massachusetts Resource Sharing

Formed in 1981 to facilitate sharing across libraries

- 155 libraries
- Patrons: 957,093
- Titles: 2,234,780
- Items: 7,880,232
- FY21 Total Circulation: 5,547,159

03

Resources

Resources and next steps
to transform your
OverDrive consortium.



Resources

Checklist

Consortium best
practices checklist



Account Team

Contact your team
for customized help!



Resource Center

Full of how-to's,
FAQs, marketing, etc.



Help/Support

Help articles on
everything Marketplace



Next Steps



04

Q&A

Your popular questions
answered live.



Thanks!

Additional questions?

Reach out to your Account Manager at
marketplace.overdrive.com/support

