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MID-HUDSON LIBRARY SYSTEM
Ad Hoc Committee on OverDrive Meeting

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Date: August 23, 2022   **Location:** Online

Committee members attending:

Columbia County
- ✓ Tobi Farley
- ✓ Tamara Gaskell
- ✓ Matthew Pavloff

Dutchess County
- ✓ Carol Bancroft
- ✓ Mary DeBellis
- ✓ Carol Fortier
- ✓ Donna Perolli
- ✓ Daniela Pulice
- ✓ Courtney Tsahalis

Greene County
- ✓ Catherine Benson
- ✓ Caroline Ford
- ✓ Jen Grounds

Putnam County
- ✓ Michele Capozzella
- ✓ Laura Crisci
- ✓ Stephanie Harrison (Chair)

Ulster County
- ✓ Julie Kelsall-Dempsey
- ☐ Gillian Murphy
- ✓ Katie Scott-Childress

Staff Attending: Rebekkah Smith Aldrich (MHLS), Nina Acosta (MHLS), Laurie Shedrick (MHLS)
Others Attending:

Discussion Items:

1. Members discussed their reactions to the information provided in the redacted 2021 OverDrive Purchasing Data Report provided after the August 19th meeting:
    a. Some felt the numbers seemed less than expected. Members were reminded that the report does not include money spent on videos, preorders, simultaneous use subscriptions, recalled content, cpc or external services (databases and streaming).
    b. Spending more does not necessarily lower weight time.
        i. Are we buying the right things? Perhaps we should:
            1. Double up on high hold items rather than purchase items with only 1 or 2 holds.
            2. Focus on the consortium holds ratio
    c. Spending totals did not correlate to library size: some small libraries are spending a lot and libraries with $0 spending are of varying sizes.
        i. The data shows there are net borrowers and net lenders. It would be beneficial for the all the member libraries to see this data.
2. "Percentage of Circ" is the percentage of e-book use out of the total system e-book circulation.
    a. It was suggested that a comparison of the % of e-book use with the % of conventional materials for each library might help member libraries decide how to allocate funds.
3. Per capita spending is based on service population.
    a. Service populations don't always accurately capture the number of patrons served.
4. Providing redacted reports to each library so that they can compare their current spending with the anonymized spending data of other member libraries would help raise awareness and may help change behavior.
5. Possible appropriate metrics were discussed.

     a. Matching percentage of spending to the percentage of holds in OverDrive.
        i. Looking at the holds and average per capita spending there is a $122K deficit. Some libraries are spending close, some are far off.
     b. Percentage of spending should match percentage of circulation.
        i. It was agreed that this metric would be useful.

6. A solution to continuously track spending is not feasible but MHLS may be able to provide an annual report that could be used as a budgeting tool for member libraries for the future fiscal year.
7. Education should be done to prepare libraries that need to increase their spending. Their budgets will be impacted; however, they may not see a change in their local circulation numbers.
8. E-book users may be "invisible." It may be helpful to conduct local focus groups so libraries can hear directly from their patrons about:
     a. Wait times/holds
     b. Early returns
     c. Sufficiency of the current collection
9. Possible reasons some libraries are underfunding:
     a. Lack of awareness
     b. Smaller libraries may not reach hold thresholds
     c. Not having an advantage account
     d. Spending on Hoopla instead of OverDrive
10. Focusing exclusively on spending totals will not improve user experience, as some libraries will pay more and some less. Wait times are not likely to improve until every library is meeting its commitment.
11. Consider reducing hold limit (currently 15).
12. Consider reducing checkout period.
13. The question was asked if checkout times could vary based on holds, this is not possible.
14. Potential strategies to maximizing the impact of spending dollars:
     a. CPC vs. shared copy:
        i. Requiring a sharable copy be purchased before CPC was discussed.
        ii. The committee endorses member libraries using CPC to enhance their collection if they are meeting their percentage of spending obligation.
        iii. **ACTION**: The Committee recommends to the Central Library/Collection Development Advisory Committee that *The Guidelines for the Collection Development for Libraries with Advantage Accounts* needs to be revised to include and address CPC. Julie Kelsall-Dempsey moved, and Mary De Bellis seconded, a motion to recommend clause 2 of this document be revisited, specifically:
           1. 2f: to advise libraries that are not hitting this threshold on how best to address purchasing in the context of high-demand holds in the system.
           2. Add "h" to address CPC as allowable if they are meeting their minimum percentage of spending obligation and/or already own one copy.
     b. Frequency of purchasing: a minimum of twice a month is recommended, weekly if possible.
        i. Using automated carts can be a time saver and a reminder to purchase.
           1. Purchasers can customize parameters for automation.
     c. Smaller libraries should use the consortium holds ratio when considering items for purchase.
        i. Items with a ratio of 7 or high should be considered.
     d. Every library should participate in annual OverDrive training, particularly those not meeting the spending expectations.
15. Accountability and potential consequences for libraries not meeting their obligations were discussed.
     a. Because state money was used to fund the platform and some titles, cutting access to the OverDrive collection is not an option.
     b. Can we bill or fine a library?

    c. Peer pressure from DAs may assist in dealing with violation problems.

    d. Additional training

        i. Training can be strongly suggested but not necessarily required.

    e. The committee favored stopping physical delivery for egregious cases of noncompliance (as is currently the case for violating resources sharing guidelines for physical items. **ACTION**: Julie Kelsall-Dempsey moved, and Carol Fortier, seconded a motion to recommend to the Resource Sharing Advisory Committee that the "Approved Procedures for Resource Sharing Standard Violations" be updated to include participation in OverDrive. This motion passed unanimously.

16. The committee agreed:

    a. Member libraries should receive a redacted copy of the 2021 OverDrive Purchasing Data Report along with a report/whitepaper drafted by this committee that defines:

        i. The issue: spending is not being shared equitably among all the member libraries.

        ii. Challenges and barriers to meeting e-book spending obligations.

            1. Smaller libraries may not reach hold thresholds.

            2. Items are expensive.

                a. Confusion about pricing models.

            3. OverDrive Marketplace not always user friendly.

            4. Timeliness of purchasing.

            5. Lack of awareness of usage and spending totals.

        iii. Recommendations for best practice:

            1. Percentage of spending should match percentage of circulation.

            2. Libraries meeting their percentage of spending obligation can use CPC to enhance their collections.

            3. Purchases should be made at least twice a month.

            4. Consortium ratios should be examined when prioritizing items for purchase.

            5. Participation in annual OverDrive education

    b. The spending report and whitepaper will be provided at the September DA meeting.

    c. Discussion of the recommendations to the Central Library/Collection Development Advisory Committee was postponed to the September 6th meeting.

    d. A draft report/whitepaper will be provided to the committee in advance of their next meeting.