

**MID-HUDSON LIBRARY SYSTEM**  
**Ad Hoc Committee on OverDrive Meeting**

**Date:** August 19, 2022

**Location:** Online

**Committee members attending:**

Columbia County

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

Greene County

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

Dutchess County

- ✓ Carol Bancroft
- ✓ Mary DeBellis
- ✓ Carol Fortier
- ✓ Donna Perolli
- ✓ Daniela Pulice
- ✓ Courtney Tsahalís

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)

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**Discussion Items:**

1. The purpose of this ad hoc committee is to develop and recommended a strategy on purchasing standards for OverDrive.
  - a. This meeting (meeting 1) will establish what will be discussed in meetings 2 and 3.
  - b. Meeting 2 is anticipated to be the main meeting where recommendations for metrics and best practices will be developed.
  - c. Meeting 3 will finalize ideas developed in meeting 2 and decide how to deliver the ad hoc committee findings to the Director's Association.
2. Members were asked why they chose to serve on this committee. Members spoke about the growing use of OverDrive among patrons, the importance of e-books in keeping libraries relevant, the need to balance demand with costs, the desire to balance to print and e-book purchases, collection development and concern about the OverDrive collection's diversity, a desire to ensure the financial burden is being distributed equitably, an interest in data and a belief that metrics could provide insight.
3. The OverDrive Ad Hoc Committee Resources provided prior to the meeting were reviewed.
  - a. E-book circulation has been consistently trending upward.
  - b. Items are being checked out under the RLA with Upper Hudson.
  - c. The current e-book purchasing guidelines are a *recommendation* and they are based heavily on the physical resources sharing document.
  - d. A small number of OU Macmillan titles are not shareable, this is a holdover from the embargo
  - e. The average system wait time is approximately 33 days. Last year it was 40. The reduction in wait time is likely due to:
    - i. A renewed library interest inspired by the formation of this committee.
    - ii. The addition of the RLA with Upper Hudson.

- iii. Advantage accounts now have control over weeding and unweeding in their own collection, making it easier for libraries to repurchase things that have expired.
4. Clarification was requested about how to identify if an item was purchased using CLDA funds. These copies are listed for a title under "Consortium" copies as OC/OU or MA copies purchased by Poughkeepsie (see screenshots below).

	Copies				
	OC/OU	MA	CPC	SU	Adv Plus
Consortium	1	0	No	No	0
Advantage	0	0	No	No	0

'Roblox Game, Studio, Unblocked, Cheats Download Guide Unofficial' ownership details			
Billing account	Unit(s)	Purchase order	Purchased on
Poughkeepsie Public Library District - 1938-0013	1	midhudsonny-20200922-091204-43754	10/6/2020

5. Committee members currently use a variety of data points for deciding whether or not to purchase a title, including: item popularity, the number of holds, the number of recommendations, the terms of the available pricing model.
6. Items Holds as a metric was discussed. It was acknowledged that some libraries rarely reach the hold threshold to trigger a purchase. It was further noted that hold reports indicate a snapshot in time and can change unexpectedly.
7. The system hold report reveals that larger libraries are not always filling holds.
8. Usage of the Upper Hudson collection is a sign that our collection on its own is insufficient.
9. Patron behaviors may need to be considered:
  - a. Do some patrons not place holds?
  - b. Do patrons defer checkouts when they don't have time?
  - c. Do patrons return titles early when they finish before the lending period expires?
10. The OverDrive Marketplace is not user friendly. Working with Nina has helped some members lower their wait times.
11. The question was raised if Hoopla affected usage or spending in OverDrive. The majority of committee members felt the Hoopla and OverDrive collections were substantially different and that Hoopla did not likely have an impact.
12. A survey to capture information about how member libraries are currently deciding what to purchase in OverDrive would be useful.
13. The committee believes that all libraries want to be good library neighbors. The thought and cost involved in purchasing makes this difficult. We know more information is needed to make good decisions but we don't yet know what that information is. It might be information on:
  - a. Percentage of budget
  - b. Lowering wait times
    - i. CPC can address wait times but does not necessarily help the shared collection
    - ii. CPC is not always available
  - c. Copies per holds
14. Why are the current guidelines not working? Do they need to be scrapped or just adjusted?
15. Library specific spending data would aid in identifying appropriate metrics to guide us and may also bring to light any misconceptions.
16. Information on metrics or best practices used by other systems was requested.
17. Raising awareness through training was discussed. Currently new director training includes training on OverDrive.

18. The committee agreed:

- a. This committee assumes all member libraries are doing their best, the information contained in the report on library spending will not be used to lay blame or shame on any library.
- b. The following items will be discussed at the 2<sup>nd</sup> meeting on August 23<sup>rd</sup>:
  - i. The library spending report:
    - 1. Does it reveal useful metrics?
    - 2. Does it reveal preconceived misconceptions about library spending?
  - ii. Collection development best practices.
  - iii. Accountability if developed guidelines are not followed.
  - iv. Recommendations to the CLDA.
  - v. OverDrive Settings: should loan periods, checkout/hold limits be adjusted.
  - vi. Patron education/staff training.