

# Report and Recommendations of the Steering Committee's Collection Development Workgroup April 2019

The Collection Development Workgroup met in January and March of 2019 to consider a list of topics and to create a recommendation for the 2020 buying pool.

The identified topics that the Workgroup considered included:

- Selection Guideline Evaluation
- CPC (Cost Per Circ) Next Steps
- Models for buying pool increase and the 2020 buying pool and holds reduction amounts
- Potential 2020 Projects
- BiblioBoard Review Process
- Holds Reduction Policy

## Selection Guideline Evaluation

In 2017 the Workgroup recommended changes to the collection including the implementation of new guidelines for selectors. These were implemented in March of 2018. A six-month evaluation of these changes was completed in September 2018 and can be found in Appendix C.

Some of the recommendations have been implemented as written:

- Do not repurchase metered titles that do not have holds
- Focus spending & selection on bestsellers, preorders, holds, and Recommend to Library (RTL)
  - RTL should be primarily for titles that are not "known entities" or are older
  - Keep max of three requests for patrons and minimum of five recommendations for a title to be purchased
- Change "always available" audiobook circulation periods to mirror ebooks
- Turn on Advantage Plus to share OCOU and Metered by Time titles (audio and ebook) that have been owned for at least 30 days and have no holds/checkouts with patrons outside of the owning system

As the review indicates, there were some significant factors in determining the effectiveness of the implementation of the selection changes:

1. A significant and unexpected increase in usage and patrons
2. Impact of Advantage Plus on holds fulfillment
3. Implementation issues of the following recommendations
  - a. Spending out half of the cap immediately for super sellers
  - b. Purchase more simultaneous use titles
  - c. Include carousel of recently returned & available eBooks and Audiobooks on Libby

While the recommendations to focus spending and selection on bestsellers, preorders, holds and RTL have been implemented, it is clear that the amount allocated to RTL is not sufficient for demand. Some selectors and member libraries are also asking for an increase in the number of recommendation requests allowed per patron per month. It has also been suggested, due to demand, that the number of times a title is recommended before it is purchased be increased. It is currently at five. To further examine use and demand of RTL, some data was collected on the dollar amount needed to fulfill all RTL requests from a sample six-month period. The Workgroup reviewed that data and agreed that it would be difficult to address the RTL issue with the current budget. The issue is a long-term problem that may not be addressed even by a budget increase. Pre-orders

were discussed as they are only ordered a month in advance, but people can recommend them before they are purchased as they are often in the catalog earlier than one month before release date. The group agreed that it may be worth re-evaluating the purchase of preorders sooner than one month before to eliminate some of the RTL. The group also discussed the promotion of titles by OverDrive. OverDrive continues to heavily promote recommendations. The WPLC does not have any control over the titles that are available for recommendation.

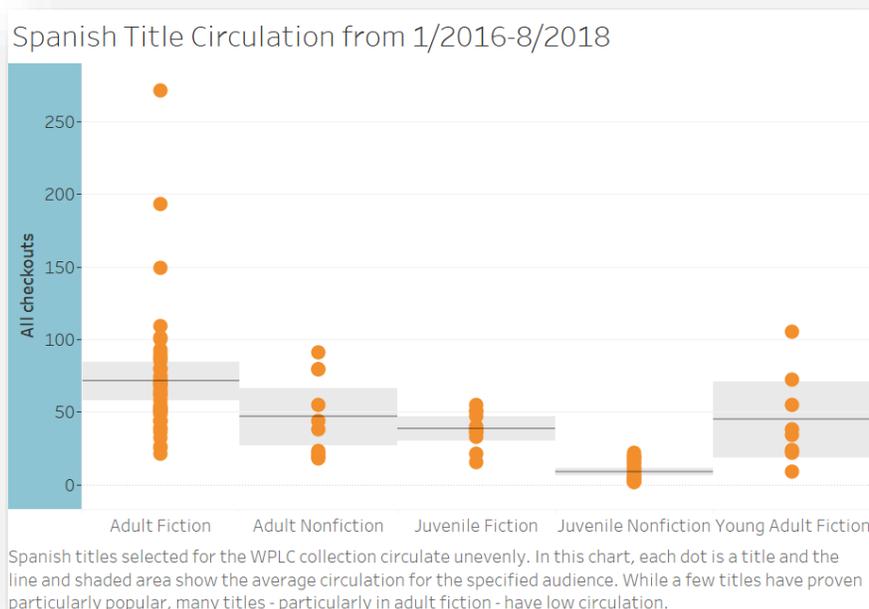
**RECOMMENDATION: The Workgroup is recommending a re-evaluation of the current policy to purchase pre-pubs only one month in advance. In addition, the Workgroup recommends investigation into the removal of some of the RTL options when searching in the WPLC Catalog.**

## Cost Per Circ (CPC) Next Steps

The scenarios below were created out of suggestions from Overdrive of how other libraries are using CPC. Each suggestion was explored, and where appropriate, titles already in the shared collection that are also available as CPC titles were identified. A cost analysis was done for the titles under both models to help in identifying which scenarios might be a good fit for the WPLC. At their September 2018 meeting, the Steering Committee was presented with the below CPC scenarios. Overall, the Committee felt CPC will work best for a Spanish Language Collection scenario. The Committee asked that the Collection Development Workgroup review the scenarios and determine a budget amount for 2019 to be allocated to a CPC Spanish Language Collection that will be self-selected by patrons.

### Scenario 1: Spanish Language Titles

One use for Overdrive's CPC program could be to enhance Spanish Language collections through a pilot. Currently the WPLC has a Spanish Language Collection of 99 titles that were added in Jan. 2016 for a cost of \$3174.77 The chart below illustrates how the Spanish Language Collection circulates unevenly. Although some of the adult fiction titles have circulated very well, many titles have low circulation There are 2874 ebooks and 492 audiobooks in Spanish available as CPC titles. A CPC collection would allow the WPLC to set a monthly budget and allow patrons to choose which titles they wish to access out of the 3500 titles available. Allowing patrons the freedom to self-select titles for checkout would increase circulations, improve patron satisfaction and provide valuable selection data to the consortium that could be used to build a robust permanent Spanish Language Collection.



### Scenario 2: Community Read Title

CPC would allow libraries or systems with Advantage accounts to host Community Reads events and provide copies of the selected titles to patrons simultaneously, without having to order hundreds of copies that will remain in their collections after the program ends. The CPC cost of best-selling titles is typically between \$1.50 and \$3.00 per checkout. Circulation from OverDrive for past "Big Library Read" programs, which tend to be mid-list titles or new authors, is around 2000 checkouts in a two-week period. We estimate a consortium-wide community read of a similar title would cost approximately \$3,000 - \$6,000. Community reads hosted by a library with an advantage account would be available only to those advantage users and cost less.

In March and April of 2018, WPLC hosted a community read of *The Round House* by Louise Erdrich. It was negotiated with the author and publisher to provide simultaneous access to this title for six weeks for a total cost of \$1600. During that period, the book was checked out 3,909 times. This puts the cost per circ for program at \$0.41 per checkout. For comparison, a similar title available in the CPC collection would cost approximately \$9,700 for the same circulation. CPC could potentially be an economical solution to providing many copies of a book to patrons at one time. Project managers have found the best value, however, is approaching a publisher directly and negotiating a price.

### Scenario 3: Low Circulating Titles

The title, *Cereal Killer*, represents many low circulating titles in the WPLC collection. *Cereal Killer* is \$1.00 under the one copy/one user model. The title has circulated 180 times for a cost of \$.02 per circ. It is also available as a CPC title for \$.99 per checkout. To achieve the same number of checkouts via CPC the consortium would spend \$178.20. This is a significant increase in price with no added benefit to collection.

### Scenario 4: Titles with Limited Shelf Life

Titles with limited shelf lives include travel books and study guides. Copies of the title, *Explorer's Guide Wisconsin*, were added to the collection in August 2015 as a metered title (52 checkouts or 2 years). The price is \$40 and the title has circulated 164 times amongst all the copies. The title is also available via CPC for \$4.00 per circ. Despite being an older travel guide, this title is still circulating well and thus not a good candidate for CPC.

In addition to the scenarios that had been presented to the Steering Committee, the Collection Workgroup discussed the possibility of doing small CPC experiments throughout the course of the year. There may be opportunities to try this model for holds reduction in other scenarios that have not yet been identified.

**RECOMMENDATION:** The Workgroup agrees that the Spanish language title scenario is a good use of CPC, but in addition, recommends that a timeframe and publicity plan be put in place. For a CPC Spanish title budget, the Workgroup recommends to start with matching the Simultaneous Use plan amounts. The Workgroup also recommended that the project managers be allowed to do some small experiments with CPC as new scenarios are considered for this purchasing model.

## Models for Buying Pool Increase and the 2020 Buying Pool and Holds Reduction Amounts

During its 2018 discussions, the Collection Development Workgroup decided to gather information about potential models for a regular WPLC buying pool increase for consideration in 2019. In order to gather this information, the topic was discussed at Board and Steering Committee meetings throughout 2018. After these discussions, a range of potential models, along with sample budgets, were created and shared with the Board and Steering Committee prior to the October 2018 Board meeting. Steering Committee members were also invited to this meeting. The complete range of potential models and the budgets presented are

included as Appendix A. At that meeting, some partners expressed support for an increase while others expressed that they would not support any increase. The complete notes from this section of the Board meeting are included as Appendix B.

A comparison of holds ratios by format for physical and digital copies of the same titles was reviewed by the Workgroup. During the discussion of these comparisons and while looking at additional data, it was noted that this discussion has been on-going for the past year by three different WPLC governing bodies. All groups, including the Workgroup have had a division on what an increase should be. The group discussed and agreed the next best step would be for the consortium to hold a WPLC Roundtable meeting. The Consortium did something similar several years ago resulting in the first \$1,000,000 buying pool. The group agreed they would like to see the Roundtable focus on the value of the collection as a core collection, the pricing of e-materials and our role as a consortium. In addition, there was discussion of doing an annual assessment of a special project fund for each year. This would be an option that could be a small amount of money, but have a big impact

**RECOMMENDATION: The Workgroup recommends no increase for the 2020 buying pool and holds reduction amount, keeping the amount at \$1,150,000. In addition, the group recommends further, continued discussions about increases, the value of the collection as a core collection, the pricing of e-materials and the role of the consortium at a WPLC Roundtable in 2019.**

## Potential 2020 Projects

At their meetings, the Workgroup discussed some potential projects that have come up during the course of the last year. Those projects included a business collection, a language learning collection and addressing titles that are mid-list with low copy amounts but have high holds. The potential projects are listed below.

### **Potential Project 1: Business Collection, to support Workforce development**

Workforce development is a key initiative for the public library systems and libraries in the state. One proposed 2020 project is to create a business collection to help Wisconsin residents develop job skills, including management, leadership, and communications.

This collection could either be a curated collection that would appear on the homepage of Wisconsin Digital Library or it could be a separate Business reading room (similar to our Children's and YA reading rooms).

### **Potential Project 2: Language Learning Titles**

There are currently 164 titles in the Consortium collection that support language learning. This could be developed further as a focused, 2020 project.

This collection too, could either be a curated collection that would appear on the homepage of Wisconsin Digital Library or it could be a separate reading room.

### **Potential Project 3: Midlist Titles with Low Copies and High Holds**

There are number of midlist titles the consortium owns few copies of, but they have a relatively high number of holds. The holds managers do catch these titles, but because of budget limitations they are typically not purchased. There could potentially be a large reduction in holds if a portion of the budget was allocated for these types of titles.

The group agreed that a business collection and a language learning collection might not be appealing to patrons but agreed to ask about interest of the areas on the surveys. The group was interested in looking into the list of midlist titles with high holds and low copy amount. Project managers gathered a list of titles where the consortium owns only one copy but each title has more that 20 holds. The Workgroup looked at the cost of

these titles as one copy/ one user, simultaneous use, and CPC. It was noted that only the audio was available as simultaneous use and not all titles were available for CPC. The Workgroup felt that this would be a great opportunity to spend little money while making a big impact on holds, while also testing out combined purchasing of Simultaneous use, CPC and one copy/one user.

**RECOMMENDATION: The Workgroup recommends that the Consortium pursue Potential Project option 3: Midlist Titles with Low Copies and High Holds and trial using a combination of purchasing options to fulfill holds. The Workgroup recommends implementing this project now, in 2019, to help give us information on how to allocate the budget and select for 2020. It was recommended that the \$10,000 donation WPLC received be used for this project.**

## BiblioBoard Review

WPLC's subscription with BiblioBoard ends in April 2020. The Workgroup was presented with the below, proposed timeline for review and decision-making about continuing beyond 2020:

- January – February 2019: Collection Development workgroup discusses what elements to include in a review of BiblioBoard.
- March 2019: Collection Development makes recommendation to retain BiblioBoard in the 2020 budget pending review.
- September-October 2019: WiLS collects information for review.
- October 2019: Collection Development workgroup makes recommendation on whether or not to continue with BiblioBoard.
- November 2019: Steering Committee reviews and takes action on recommendation.
- February 2020: Board reviews and takes action on recommendation.

The Workgroup reviewed and agreed with the proposed timeline, and identified information to collect for the evaluation including BiblioBoard use, author contest participation, and library and patron stories.

**RECOMMENDATION: The Workgroup recommends putting a placeholder for BiblioBoard in the 2020 budget, conducting an evaluation in the fall of 2019, and making a final recommendation to Steering in October of 2019.**

## Holds Reduction Amount Policy Recommendation

The Holds Reduction portion of the budget was first implemented in the 2018 budget. At the end of the year, there were a couple of systems that had not spent out all of their Holds Reduction amount on their Advantage account. The Workgroup felt there should be a policy in place to encourage the spending of that money within the fiscal year. The group agreed that a policy should be put in place that if an Advantage account has not spent out their Holds reduction amount by 30 days after the end of the year (Jan 30), the remaining, unspent funds should be moved back into the consortium account.

**RECOMMENDATION: The Workgroup recommends a Holds Reduction policy where Advantage accounts are required to spend their Holds Reduction amount within the fiscal year it was received. If a system has not spent out their Holds reduction amount by 30 days after the end of the year (Jan 30), the remaining, unspent funds should be moved back into the consortium account.**

## Appendix A

### #1: Annual percentage increase

In this model, the annual budget would increase by a set percentage each year.

*Example 1: This budget example shows a 1% increase for 2020, 2021, and 2022 by system based on 2019 buying pool share divisions. {Note: The increase percentage was selected simply for the purpose of illustration}*

| Example 1: Flat percentage increase each year                |                        |                        |                        |                        |
|--|------------------------|------------------------|------------------------|------------------------|
| [1% was selected for the purposes of illustration]           |                        |                        |                        |                        |
|  | 2019                   | 2020                   | 2021                   | 2022                   |
|  | Approved               | 1% increase*           | 1% increase*           | 1% increase*           |
| Arrowhead Library System                                     | \$ 30,091.62           | \$ 30,392.54           | \$ 30,696.46           | \$ 31,003.43           |
| Bridges Library System                                       | \$ 113,910.62          | \$ 115,049.72          | \$ 116,200.22          | \$ 117,362.22          |
| Indianhead Federated   | \$ 102,599.07          | \$ 103,625.06          | \$ 104,661.31          | \$ 105,707.92          |
| Kenosha County Library System                                | \$ 28,552.75           | \$ 28,838.28           | \$ 29,126.66           | \$ 29,417.93           |
| Lakeshores Library System                                    | \$ 47,222.06           | \$ 47,694.28           | \$ 48,171.22           | \$ 48,652.93           |
| Manitowoc-Calumet Library System                             | \$ 18,174.72           | \$ 18,356.47           | \$ 18,540.03           | \$ 18,725.43           |
| Milwaukee Co. Federated Library System                       | \$ 129,839.27          | \$ 131,137.67          | \$ 132,449.04          | \$ 133,773.53          |
| Monarch Library System                                       | \$ 79,165.19           | \$ 79,956.84           | \$ 80,756.41           | \$ 81,563.97           |
| Nicolet Federated Library System***                          | \$ 72,991.53           | \$ 73,721.44           | \$ 74,458.66           | \$ 75,203.24           |
| Northern Waters Library Service                              | \$ 34,723.83           | \$ 35,071.07           | \$ 35,421.78           | \$ 35,775.99           |
| Outagamie Waupaca Library System***                          | \$ 48,148.46           | \$ 48,629.95           | \$ 49,116.25           | \$ 49,607.41           |
| South Central Library System                                 | \$ 244,341.97          | \$ 246,785.39          | \$ 249,253.24          | \$ 251,745.78          |
| Southwest Wisconsin Library System                           | \$ 25,436.20           | \$ 25,690.56           | \$ 25,947.46           | \$ 26,206.94           |
| Winding Rivers Library System                                | \$ 57,916.60           | \$ 58,495.77           | \$ 59,080.73           | \$ 59,671.53           |
| Winnefox Library System                                      | \$ 56,867.03           | \$ 57,435.70           | \$ 58,010.05           | \$ 58,590.15           |
| Wisconsin Valley Library Service                             | \$ 60,019.09           | \$ 60,619.28           | \$ 61,225.47           | \$ 61,837.73           |
| <b>Totals</b>  | <b>\$ 1,150,000.00</b> | <b>\$ 1,161,500.00</b> | <b>\$ 1,173,115.00</b> | <b>\$ 1,184,846.15</b> |
| Increase from 2019   |                        | \$ 11,500.00           | \$ 23,115.00           | \$ 34,846.15           |
| <i>*Percentage selected for the purposes of illustration</i> |                        |                        |                        |                        |

### #2: Increase based on circulation

In this model, the increase would correlate to the percentage increase in circulation of the collection. The collection budget would not decrease, however, if circulation decreased. The model could take different forms:

- Percentage increase of circulation equals the exact percentage increase for the collection. A cap would be established so that the percentage increase would not exceed X%.
- Percentage increase for the collection is based on ranges of increase in circulation.

*Examples:*

*2a). From 2016 to 2017, our circulation increased 7%, so the budget would increase 7%. The budget example shows a 7% increase for 2020. {NOTE: In reality, we would use the numbers from the previous year compared to two years ago. We cannot do that for this example because 2018 is not done yet.}*

*2b). From 2016 to 2017, our circulation increased 7%. We are working under the following chart for increases based on circulation:*

| <i>If circulation increases....</i> | <i>Budget increases...</i> |
|-------------------------------------|----------------------------|
| <i>&lt;0 to 0%</i>                  | <i>0%</i>                  |
| <i>1% to 5%</i>                     | <i>2%</i>                  |
| <i>6% to 10%</i>                    | <i>4%</i>                  |
| <i>&gt;10%</i>                      | <i>6%</i>                  |

*The budget example shows a 4% increase based on this chart. {Note: The budget increases percentages in this chart were selected simply for the purpose of illustration}*

**Example 2: Increase based on circulation**

2a. Percentage increase equal to the increase in circulation (Column C)

2b. Percentage increase based on range of circulation (Column D) {4% selected for purposes of illustration}

|  | 2019                   | 2a  | 2b                                      |
|--|------------------------|---|---|
|  | Approved               | 2020                                      | 2020                                    |
|  |                        | 7% increase based on circulation increase | 4% increase based on circulation range* |
| Arrowhead Library System                                     | \$ 30,091.62           | \$ 32,198.03                              | \$ 31,295.29                            |
| Bridges Library System                                       | \$ 113,910.62          | \$ 121,884.36                             | \$ 118,467.04                           |
| Indianhead Federated   | \$ 102,599.07          | \$ 109,781.00                             | \$ 106,703.03                           |
| Kenosha County Library System                                | \$ 28,552.75           | \$ 30,551.45                              | \$ 29,694.86                            |
| Lakeshores Library System                                    | \$ 47,222.06           | \$ 50,527.60                              | \$ 49,110.94                            |
| Manitowoc-Calumet Library System                             | \$ 18,174.72           | \$ 19,446.95                              | \$ 18,901.71                            |
| Milwaukee Co. Federated Library System                       | \$ 129,839.27          | \$ 138,928.02                             | \$ 135,032.84                           |
| Monarch Library System                                       | \$ 79,165.19           | \$ 84,706.75                              | \$ 82,331.79                            |
| Nicolet Federated Library System***                          | \$ 72,991.53           | \$ 78,100.93                              | \$ 75,911.19                            |
| Northern Waters Library Service                              | \$ 34,723.83           | \$ 37,154.50                              | \$ 36,112.78                            |
| Outagamie Waupaca Library System***                          | \$ 48,148.46           | \$ 51,518.86                              | \$ 50,074.40                            |
| South Central Library System                                 | \$ 244,341.97          | \$ 261,445.91                             | \$ 254,115.65                           |
| Southwest Wisconsin Library System                           | \$ 25,436.20           | \$ 27,216.73                              | \$ 26,453.64                            |
| Winding Rivers Library System                                | \$ 57,916.60           | \$ 61,970.76                              | \$ 60,233.27                            |
| Winnefox Library System                                      | \$ 56,867.03           | \$ 60,847.72                              | \$ 59,141.71                            |
| Wisconsin Valley Library Service                             | \$ 60,019.09           | \$ 64,220.43                              | \$ 62,419.85                            |
| <b>Totals</b>  | <b>\$ 1,150,000.00</b> | <b>\$ 1,230,500.00</b>                    | <b>\$ 1,196,000.00</b>                  |
| Increase from 2019   |                        | \$ 80,500.00                              | \$ 46,000.00                            |
| <i>*Percentage selected for the purposes of illustration</i> |                        |   |   |

**#3: Increase based on circulation (with a wait-time trigger)**

This model is the same as #2 except that the increase would be applied only if average wait-times increased from the previous year in one of two ways:

- a) By a certain percentage or;
- b) If average wait-times exceeded a certain threshold of days. This number of days could be based on history of wait times for WPLC and comparisons with peers. Below is a chart that lists the WPLC average wait times and average wait times from three peers from 2016-2017:

|               | <b>WPLC</b> | <b>Peers</b> |
|---------------|-------------|--------------|
| 2016          | 57.3        | 35.4         |
| 2017          | 54.2        | 37.3         |
| Jan-June 2018 | 43.3        | 36.2         |

Examples:

- 3a). From 2016 to 2017, our average wait-times declined from 57.3 to 54.2 days, so the increases illustrated in Example 2 would not be triggered.
- 3b). The threshold for average wait time is 40 days. Because our wait time exceeded 40 days, the increases in Example 2 would be triggered. {Note: The threshold for average wait time was selected simply for the purpose of illustration}

**#4: Increase based on average wait-time**

This model would rely on average wait-times to determine the percentage increase. The model could take many forms including:

- a) Percentage increase directly correlated to the percentage increase in wait times. For example, if wait times went up 5%, then the increase for the collection would be 5%. There would be a cap established so the increase would not exceed X%. The amount would not go down if wait times decreased.
- b) Standard percentage increase until a wait time threshold was met. In this model, a wait-time threshold would be set (40 days, for example) and until the collection met that wait time, the budget would go up by a set percentage each year.
- c) Percentage increase based on the percentage average wait-time is above a threshold: In this model, a threshold would be established (40 days, for example). If the average wait-time is above the set threshold, the collection budget would increase by the same percentage.
- d) Percentage increase based on ranges of time above the threshold. In this model, a threshold would be established (40 days, for example). If the average wait-time is above the set threshold, the collection budget would increase by a percentage based on a range of amount of time above the threshold.

**Examples:**

- 4a). From 2016 to 2017, our average wait-times declined from 57.3 to 54.2 days, so there would be no increase.
- 4b). Because the wait-time threshold of 40 days was not met, the budget would increase by 2%. {Note: The threshold for average wait time and the increase percentage were selected simply for the purpose of illustration}
- 4c). In 2017, the average wait time was 54.2 days. If our threshold is 40 days, the 2017 average wait time is 35.5% above the threshold, so the budget would increase by 35.5%. {Note: The threshold for average wait time was selected for the purpose of illustration.}
- 4d). Our threshold for average wait time is 40 days. We are working under the following chart for increases based on wait time:

| <b>If hold times are X days above 40 days...</b> | <b>Budget increases...</b> |
|--|----------------------------|
| 0  | 0%                         |
| 1 to 5   | 2%                         |
| 6 to 10  | 4%                         |
| >10%   | 6%                         |

The budget example shows a 6% increase based on this chart. {Note: The budget increases percentages and threshold in this chart were selected simply for the purpose of illustration}

| Example 4: Increase based on average wait time                                |                        |  |   |   |  |
|---|------------------------|--|---|---|--|
|   | 2019                   | 4a                                       | 4b  | 4c  | 4d   |
|   | 2019                   | 2020                                     | 2020  | 2020  | 2020   |
|   | Approved               | 0% increase because wait times decreased | 2% increase because wait time threshold not met.* | 35.5% increase because wait time is 35.5% over threshold time.* | 6% increase based on days over threshold time ranges.* |
| Arrowhead Library System  | \$ 30,091.62           | \$ 30,091.62                             | \$ 30,693.45                                      | \$ 40,774.15  | \$ 31,897.12   |
| Bridges Library System  | \$ 113,910.62          | \$ 113,910.62                            | \$ 116,188.83                                     | \$ 154,348.89   | \$ 120,745.25  |
| Indianhead Federated  | \$ 102,599.07          | \$ 102,599.07                            | \$ 104,651.05                                     | \$ 139,021.74   | \$ 108,755.01  |
| Kenosha County Library System   | \$ 28,552.75           | \$ 28,552.75                             | \$ 29,123.81                                      | \$ 38,688.98  | \$ 30,265.92   |
| Lakeshores Library System   | \$ 47,222.06           | \$ 47,222.06                             | \$ 48,166.50                                      | \$ 63,985.89  | \$ 50,055.38   |
| Manitowoc-Calumet Library System  | \$ 18,174.72           | \$ 18,174.72                             | \$ 18,538.22                                      | \$ 24,626.75  | \$ 19,265.21   |
| Milwaukee Co. Federated Library System  | \$ 129,839.27          | \$ 129,839.27                            | \$ 132,436.06                                     | \$ 175,932.22   | \$ 137,629.63  |
| Monarch Library System  | \$ 79,165.19           | \$ 79,165.19                             | \$ 80,748.49                                      | \$ 107,268.83   | \$ 83,915.10   |
| Nicolet Federated Library System***   | \$ 72,991.53           | \$ 72,991.53                             | \$ 74,451.36                                      | \$ 98,903.52  | \$ 77,371.02   |
| Northern Waters Library Service   | \$ 34,723.83           | \$ 34,723.83                             | \$ 35,418.30                                      | \$ 47,050.79  | \$ 36,807.26   |
| Outagamie Waupaca Library System***   | \$ 48,148.46           | \$ 48,148.46                             | \$ 49,111.43                                      | \$ 65,241.17  | \$ 51,037.37   |
| South Central Library System  | \$ 244,341.97          | \$ 244,341.97                            | \$ 249,228.81                                     | \$ 331,083.37   | \$ 259,002.49  |
| Southwest Wisconsin Library System  | \$ 25,436.20           | \$ 25,436.20                             | \$ 25,944.92                                      | \$ 34,466.04  | \$ 26,962.37   |
| Winding Rivers Library System   | \$ 57,916.60           | \$ 57,916.60                             | \$ 59,074.93                                      | \$ 78,476.99  | \$ 61,391.60   |
| Winnefox Library System   | \$ 56,867.03           | \$ 56,867.03                             | \$ 58,004.37                                      | \$ 77,054.82  | \$ 60,279.05   |
| Wisconsin Valley Library Service  | \$ 60,019.09           | \$ 60,019.09                             | \$ 61,219.47                                      | \$ 81,325.87  | \$ 63,620.23   |
| <b>Totals</b>   | <b>\$ 1,150,000.00</b> | <b>\$ 1,150,000.00</b>                   | <b>\$ 1,173,000.00</b>                            | <b>\$ 1,558,250.00</b>  | <b>\$ 1,219,000.00</b>                                 |
| Increase from 2019  |                        | \$ -                                     | \$ 23,000.00                                      | \$ 408,250.00   | \$ 69,000.00   |
| <i>*Percentage and/or threshold selected for the purposes of illustration</i> |                        |  |   |   |  |

#### #5: Increase for special project

This model would allow the Collection Development Workgroup to identify a problem area of the collection each year and request an increase to work on resolving that particular problem. A "do not exceed" amount for the annual request could be established.

Examples:

5a). *The one copy hold problem: While patrons are used to waiting for best sellers, waiting long periods of time for mid-list titles where WPLC owns only one copy may be more frustrating to them and inflate the perception of wait times for the WPLC collection. Adding just one copy of these mid-list titles could significantly impact average wait times. Based on data from October 8, 2018, purchasing an additional copy of all of the titles that appear to be available for purchase would cost \$32,397.*

5b). *The demand for audiobooks problem: Audiobooks continue to grow in popularity in the WPLC collection. Because of the price of audiobooks, we do not currently meet our stated 20 holds to 1 copy holds ratio. Based on data from October 8, 2018, purchasing enough copies to bring all audiobook holds of one copy one user titles that appear to be available for purchase to a 20:1 ratio would cost \$19,194.*

**Example 5: Increase for special projects**

5a. Mid-list one copy problem (Column C)

5b. Audiobook problem (Column D)

|  | 2019                   | 5a<br>2020  | 5b<br>2021                                |
|--|------------------------|---|---|
|  | Approved               | \$32,397 increase to<br>purchase additional<br>copies | \$19,194 to purchase<br>additional copies |
| Arrowhead Library System               | \$ 30,091.62           | \$ 30,939.34  | \$ 30,593.86                              |
| Bridges Library System                 | \$ 113,910.62          | \$ 117,119.63   | \$ 115,811.83                             |
| Indianhead Federated                   | \$ 102,599.07          | \$ 105,489.42   | \$ 104,311.49                             |
| Kenosha County Library System          | \$ 28,552.75           | \$ 29,357.12  | \$ 29,029.31                              |
| Lakeshores Library System              | \$ 47,222.06           | \$ 48,552.36  | \$ 48,010.21                              |
| Manitowoc-Calumet Library System       | \$ 18,174.72           | \$ 18,686.73  | \$ 18,478.07                              |
| Milwaukee Co. Federated Library System | \$ 129,839.27          | \$ 133,497.02   | \$ 132,006.35                             |
| Monarch Library System                 | \$ 79,165.19           | \$ 81,395.37  | \$ 80,486.49                              |
| Nicolet Federated Library System***    | \$ 72,991.53           | \$ 75,047.79  | \$ 74,209.79                              |
| Northern Waters Library Service        | \$ 34,723.83           | \$ 35,702.04  | \$ 35,303.38                              |
| Outagamie Waupaca Library System***    | \$ 48,148.46           | \$ 49,504.87  | \$ 48,952.08                              |
| South Central Library System           | \$ 244,341.97          | \$ 251,225.40   | \$ 248,420.14                             |
| Southwest Wisconsin Library System     | \$ 25,436.20           | \$ 26,152.77  | \$ 25,860.74                              |
| Winding Rivers Library System          | \$ 57,916.60           | \$ 59,548.19  | \$ 58,883.25                              |
| Winnefox Library System                | \$ 56,867.03           | \$ 58,469.04  | \$ 57,816.16                              |
| Wisconsin Valley Library Service       | \$ 60,019.09           | \$ 61,709.91  | \$ 61,020.83                              |
| <b>Totals</b>                          | <b>\$ 1,150,000.00</b> | <b>\$ 1,182,397.00</b>                                | <b>\$ 1,169,194.00</b>                    |
| Increase from 2019                     |                        | \$ 32,397.00  | \$ 19,194.00                              |

## Appendix B

### ***Discussion: Potential Models for Buying Pool Increase***

In 2018, the Collection Development Workgroup suggested some information gathering about a potential regular annual increase. Since that time, the topic has been discussed at Board and Steering Committee meetings. Based on the information gathered at these meetings, with input from the Collection Development Workgroup, the project managers prepared some sample models and budgets for discussion. The purpose of the discussion today is to provide information to the Collection Development Workgroup, who will make a recommendation in 2019.

The group discussed the models and their initial thoughts. D. Frandup reported that WVLS doesn't think that any of the options are palatable. He suggested to move the funding formula of 25% population and 75% usage to 100% based on usage because of the assertion that patrons are not using the service as much in rural areas with less available broadband. C. Meyer noted that basing the formula completely on usage could cause a big jump in cost if there is an increase in usage. M. Van Pelt noted that the original funding formula was decided to include population in the formula to help ensure steady increases as a formula based solely on usage could potentially cause large fluctuations in cost for partners.

S. Machones agreed with WVLS that it is difficult for small, rural libraries to increase their contribution amount with their current, flat funding and that their patrons aren't using the service as much because of broadband issues.

M. Welch wants to keep an increase up for discussion and to look at ways to increase funding for the collection. She noted the Consortium has been at \$1,000,000 for a long time and the group needs to keep this in mind and look at ways to increase it. IFLS found the special project option (#5) very interesting and thinks this is a good option.

S. Ohs agreed that rural libraries have an issue with the increase in funding, however the LLS directors met and agreed that even though budgets are flat, the demand is continuing to rise and so they need to move forward. LLS directors are interested in either option #1 or #5.

K. Anderson stated that WRLS serves a very rural area as well, but their memberships felt that the collection needs to be maintained and they did informally vote for an increase. They also felt that if the Consortium does not increase, they will vote to increase their Advantage account. They would like to see the increase split between special projects and high holds.

S. Platteter reported that ALS has tried to meet the demand for content with Hoopla. If the Consortium moves forward with an increase, they would be inclined to favor the special project option as well.

J. MacPhail reported that they continuously have put money towards their Advantage account. She noted that they don't have additional funds as well, but felt that it is important to consider the WPLC collection a part of the core collection and therefore reallocate funds within their library to make the increase happen.

J. Gilderson-Duwe suggested looking at reallocating the budget by looking at share of holds by system and rate of change in use.

C. Meyers feels that if the group wants the WPLC project to have a future, we need to invest in it and asked if the answer is to invest more into the system Advantage accounts. It was noted that library collections need to be looked at differently and these digital collections are no longer bonus collections but part of the core collection that patrons of WI have access to.

It was reported that our wait times have been trending down, compared to our peers. However, in the last six months, WPLC, along with our peers, have seen a spike in holds. C. Meyer noted this is most likely because of the launch of Libby. The group agreed that they all have seen an increase in use because of the ease of use of the Libby app.

M. Arend noted that patrons will accept long wait times for physical items but not for digital. WFLS did some calculation of their physical materials and wait times and it can take 30 weeks or more for holds to clear in their system. It was suggested that this data for physical collections should be gathered for all systems for the collection development group to review.

The group agreed that they would love to see a comparison of physical vs digital by format of holds and wait times for the systems.

For those that are interested in model #1, the primary reason was that it would lead to predictable increases.

The group also determined that the models that would be most likely to be supported are #1 (Annual Percentage Increase) and #5 (Increase for Special Project).

The group was asked to send any additional information/ data to be requested to review by the Collection Development Committee to the project managers.

## Appendix C

### WPLC 2018 Collection Development Recommendation 6-Month Review

September 2018

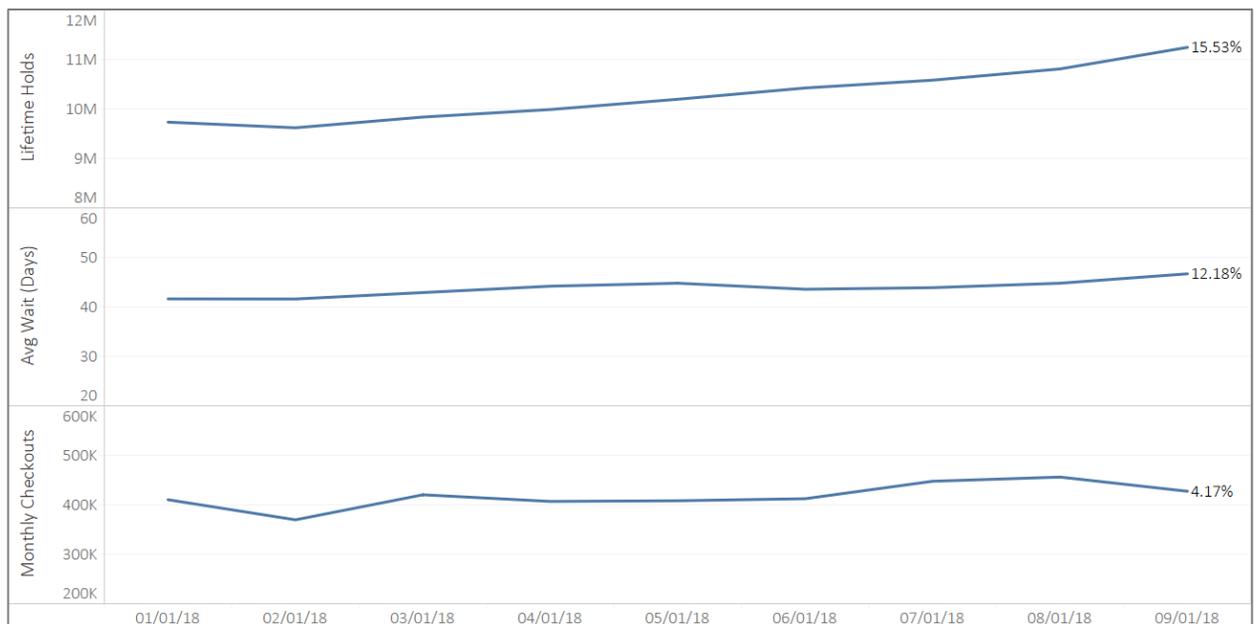
In 2018, changes were made to the WPLC collection development in order to decrease wait times for OverDrive users. These changes included:

- Purchase no more than 80 copies of any OCOU title (Metered titles have no cap). Spend out 1/2 cap (40 copies) right away for titles that are known bestsellers.
- Do not repurchase metered titles that do not have holds
- Purchase more simultaneous use titles
- Focus spending & selection on bestsellers, preorders, holds, and RTL
  - RTL should be primarily for titles that are not "known entities" or are older
  - Keep max of three requests for patrons and minimum of five recommendations for a title to be purchased
- Include carousel of recently returned & available eBooks and Audiobooks on Libby
- Change "always available" audiobook circulation periods to mirror ebooks
- Turn on Advantage Plus to share OCOU and Metered by Time titles (audio and ebook) that have been owned for at least 30 days and have no holds/checkouts with patrons outside of the owning system

The purpose of this review is to determine how effective these changes have been. However, there are three significant factors that make this determination difficult:

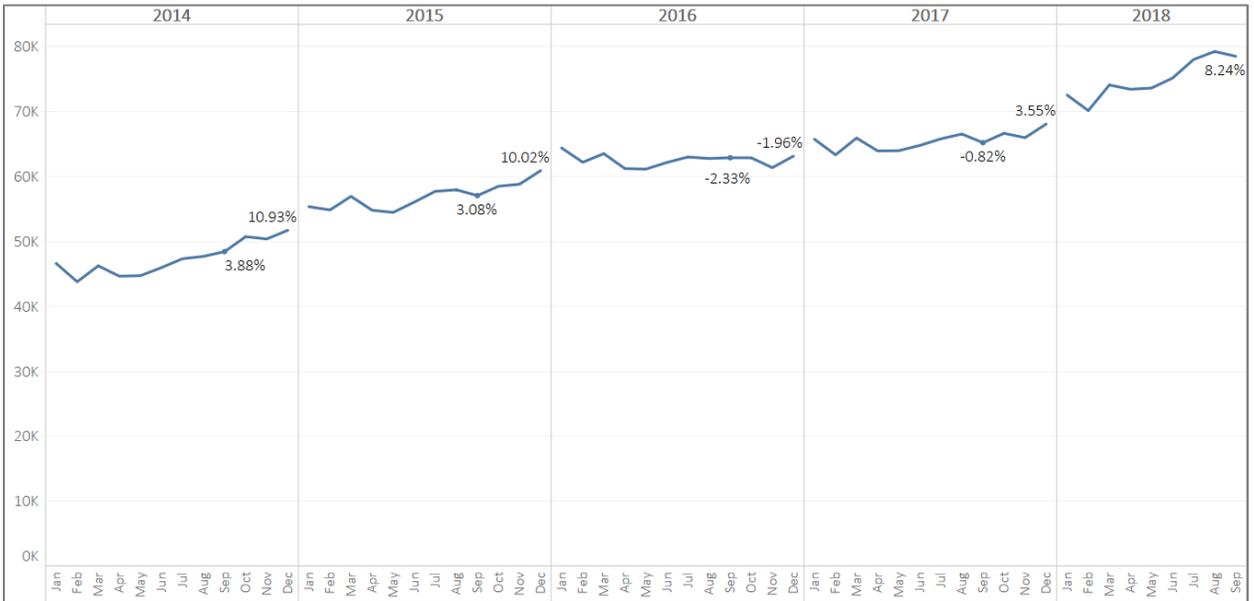
1. *Significant and unexpected increase in usage and patrons*

Over the course of the year, usage of the WPLC collection has increased by all measures. Across the full collection, lifetime holds are up 15%, average wait time has increased 12% (about 5 days), and monthly checkouts have increased 4%. The following chart depicts the increases.

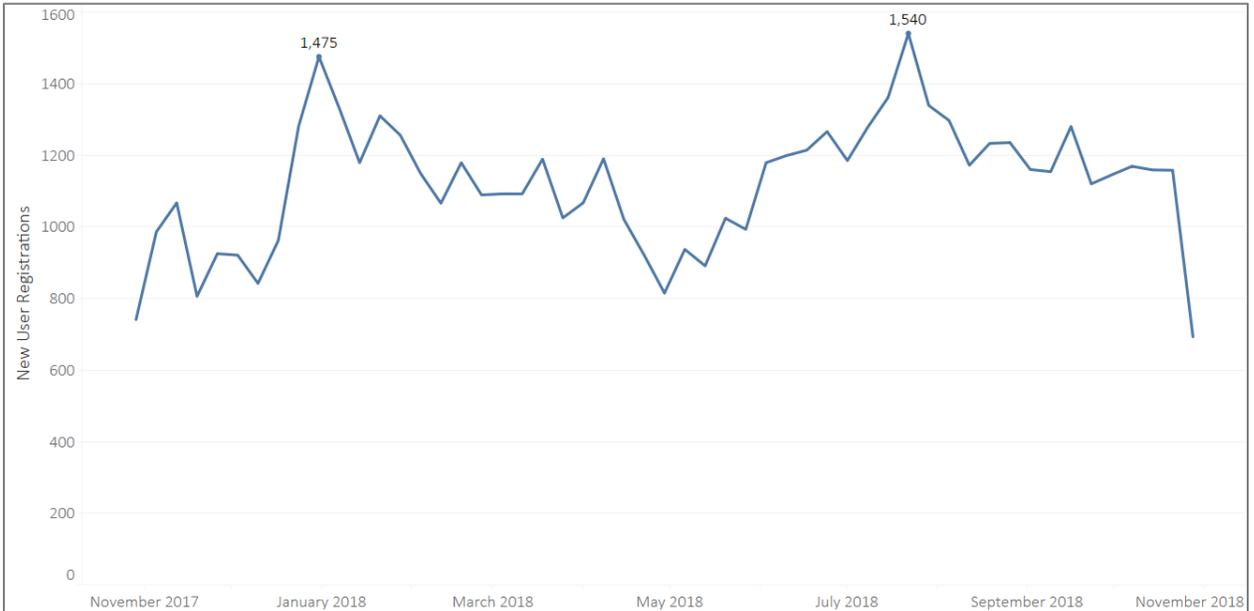


One cause of these increases is a significant increase in users. While the consortium typically increases its user base each year, it is likely the promotion of Libby by OverDrive led to an unusually high increase in the number of users in 2018. Below, we see that while the January through September increase in users with checkouts has typically been no higher than 3%, this year unique users increased 8% during

that timeframe. In the chart below, labels below the line indicate the Jan-Sep percent change in unique users, while labels above the line indicate the annual (Jan-Dec) percent change in unique users.



The consortium saw a normal increase in users in the weeks just following Christmas 2018. However, a second, atypical, peak in user registrations happened in July 2018, when Libby was featured in the iTunes App store:



We have learned that the WPLC is not alone in this increase. Other consortia and large single library collections have experienced a similar trend in increased activities and a related increase in holds. This significant increase in users makes it more difficult to evaluate the impact of changes made to consortium purchasing guidelines.

### 2. *Impact of Advantage Plus on holds fulfillment*

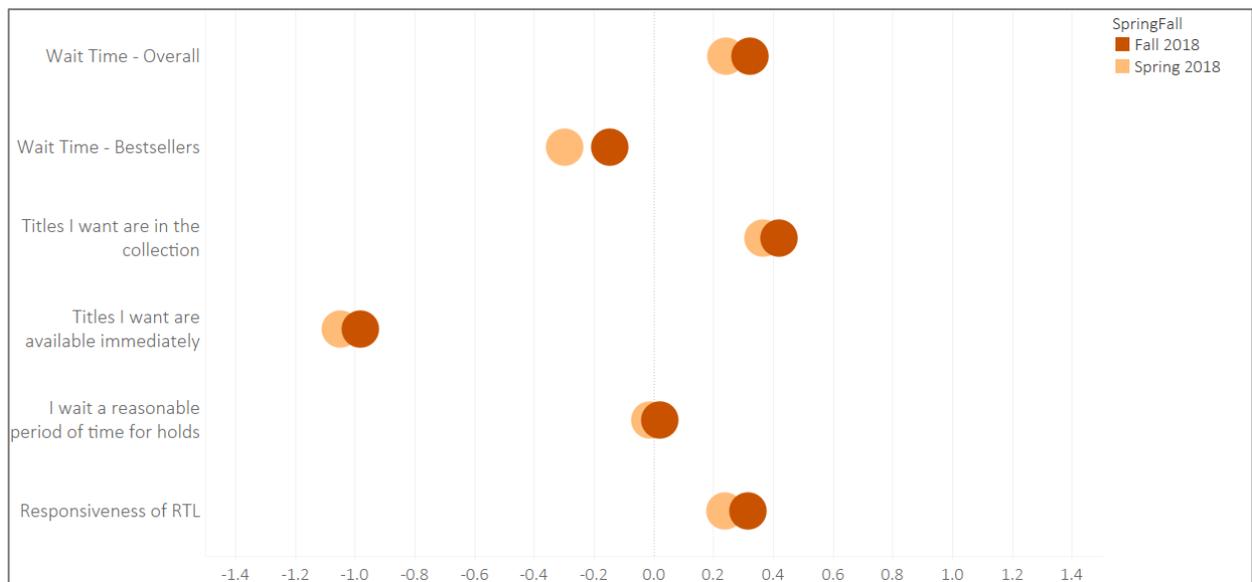
In March 2018, Advantage Plus was implemented for the WPLC collection. Advantage titles that have been owned for at least 30 days and have no holds/checkouts are now shared with the consortium collection.

An automated process identifies what titles are not meeting a certain holds ratio and selects those titles to purchase additional copies. As the project managers began analysis of hold times, it became evident that Advantage Plus titles are not being included in this automated process. As a result, 220 titles not owned by the consortium but shared through Advantage Plus had 10 or more holds on them as of October 8th. The project managers are now manually identifying these titles to purchase additional copies and are working with OverDrive to get these titles added to the automated process. However, many holds built up on these titles in the meantime, impacting wait times and holds ratios.

### 3. *Implementation issues of recommendations*

Given the significant increase in users, the main mechanism we have to evaluate the changes that have been implemented is the user satisfaction survey. The survey was sent to the same group of users twice in 2018. The Spring survey was administered in late May through early April and the Fall survey was administered in late September through early October.

In the survey results below, we can see that satisfaction increased slightly on all measures between the Spring survey and the Fall survey. The most significant satisfaction increase was in wait time on bestsellers.



This overview shows us that while wait times have increased, satisfaction with the collection has also increased, albeit slightly. The satisfaction increase may be due in part to the recommendations for changes in purchasing guidelines.

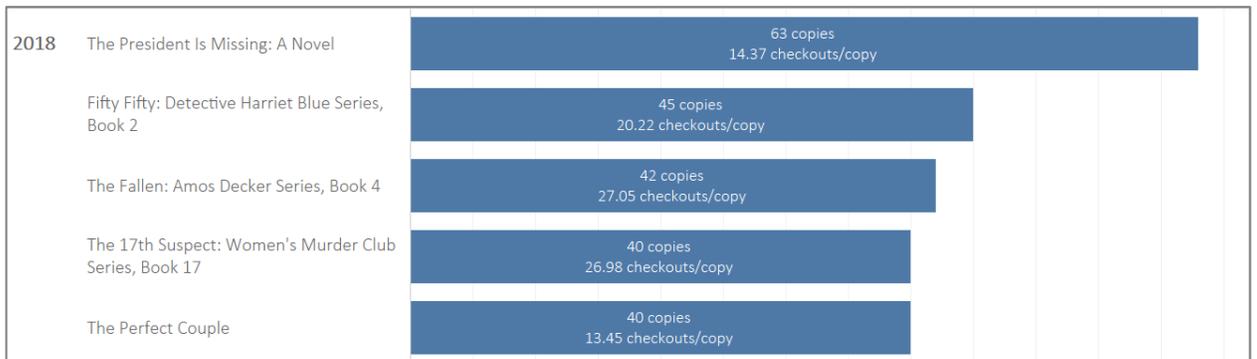
Some of the recommendations have been implemented as written:

- Do not repurchase metered titles that do not have holds
- Focus spending & selection on bestsellers, preorders, holds, and RTL
  - RTL should be primarily for titles that are not "known entities" or are older

- Keep max of three requests for patrons and minimum of five recommendations for a title to be purchased
- Change "always available" audiobook circulation periods to mirror ebooks
- Turn on Advantage Plus to share OCOU and Metered by Time titles (audio and ebook) that have been owned for at least 30 days and have no holds/checkouts with patrons outside of the owning system

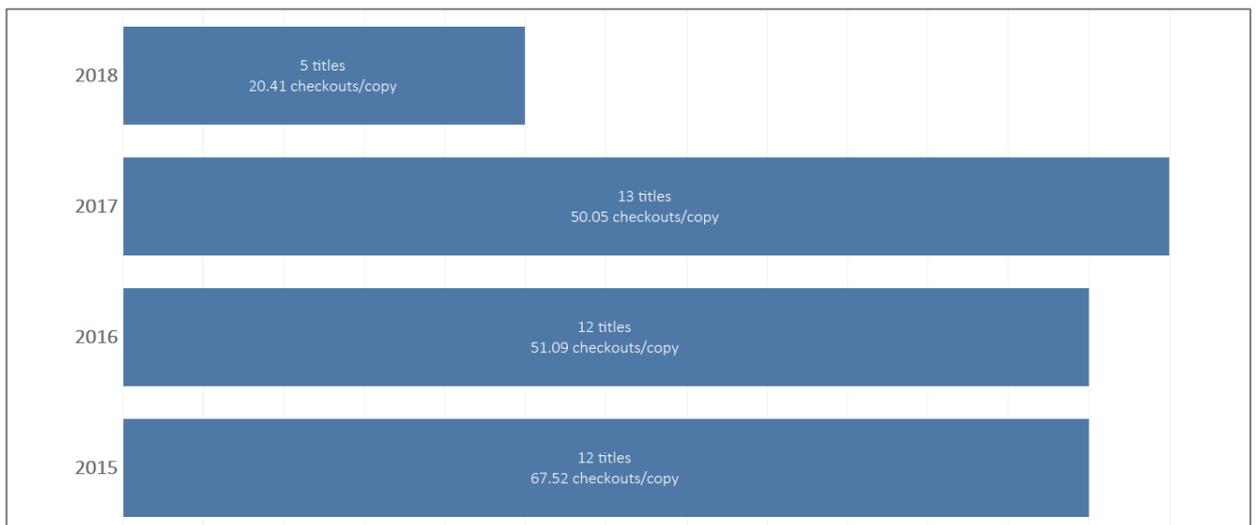
The following three recommendations have experienced implementation issues:

1. *Purchase no more than 80 copies of any OCOU (One Copy, One User) title (Metered titles have no cap). Spend out half of cap (40 copies) right away for titles that are known bestsellers.*



As of October 1st, we can see that only 5 OCOU ebook titles with a first purchase date in 2018 have 40+ copies in the collection. This indicates that this recommendation was not be being followed by selectors. There are two reasons behind this recommendation not being implemented: Selectors choosing bestsellers felt uncomfortable encumbering a very large amount of money on a few titles at the time of initial purchases and some adjusting of the budget allocations needed to happen to accommodate the overwhelming number of recommendations from patrons the selectors received.

Below, we can see that the number of titles with 40+ copies and first purchase in 2018 is significantly lower than for titles first purchased in prior years. This is likely largely due to more copies being purchased as the 20:1 holds ratio is met, nevertheless it demonstrates that purchasing may not be adequately anticipating prospective holds.



2. *Purchase more simultaneous use titles.*

The WPLC has had success with simultaneous use audio collections in recent years and had anticipated adding additional collections of simultaneous use titles this year. Unfortunately, when selectors went to build a collection of Blackstone audio titles, it was discovered that over one third of the titles were single titles from series, that, if added, would cause frustration with users as they would have to wait for other titles in series as they are not offered as simultaneous use. Another large portion of the titles were classics like *The Count of Monte Cristo* and *Crime and Punishment*. The intention when adding simultaneous use titles is to create a collection of current, stand-alone (not series) titles.

The consortium did add 50 simultaneous use ebook titles from the SELF-e Select program via BiblioBoard. The titles were award winners from Library Journal’s Indie ebook Awards. The titles were added free of charge and circulated 14,367 times between June 1st and September 30th.

The chart below shows the circulation and total checkouts per title for both standard eBook titles (OCO and metered) and SELF-e Select titles over that period. You can see that while circulations for SELF-e titles are only a small portion of total checkouts, the per-title circulation is many times higher in the simultaneous use model.



3. *Include carousel of recently returned & available eBooks and Audiobooks on Libby*

Project managers requested carousels of both recently returned and available titles on Libby from OverDrive. OverDrive added a carousel of available titles but has not yet added a carousel of recently returned titles.