

WPLC 2018 Collection Development Recommendation 6-Month Review

September 2018

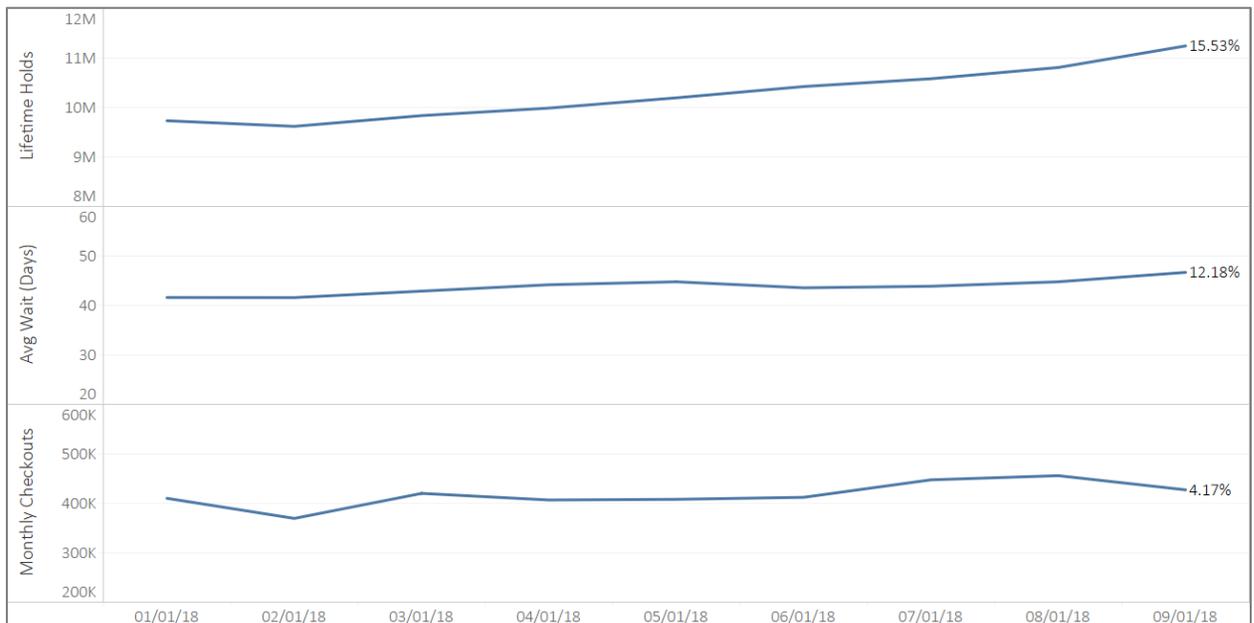
In 2018, changes were made to the WPLC collection development in order to decrease wait times for OverDrive users. These changes included:

- 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

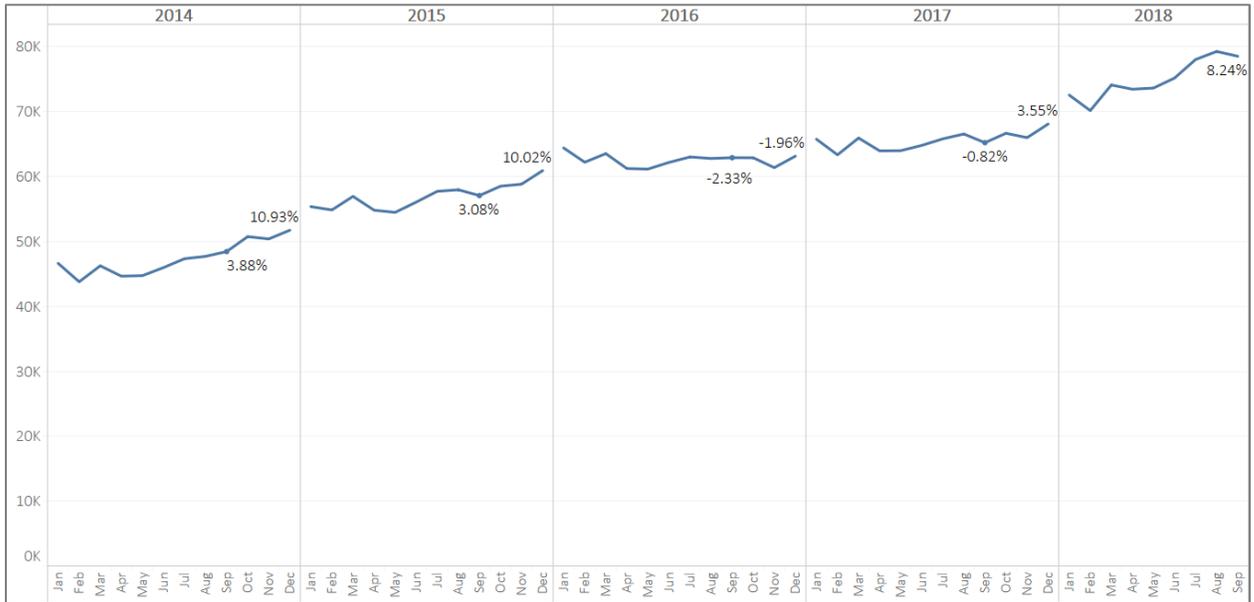
The purpose of this review is to determine how effective these changes have been. However, there are three significant factors that make this determination difficult:

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*

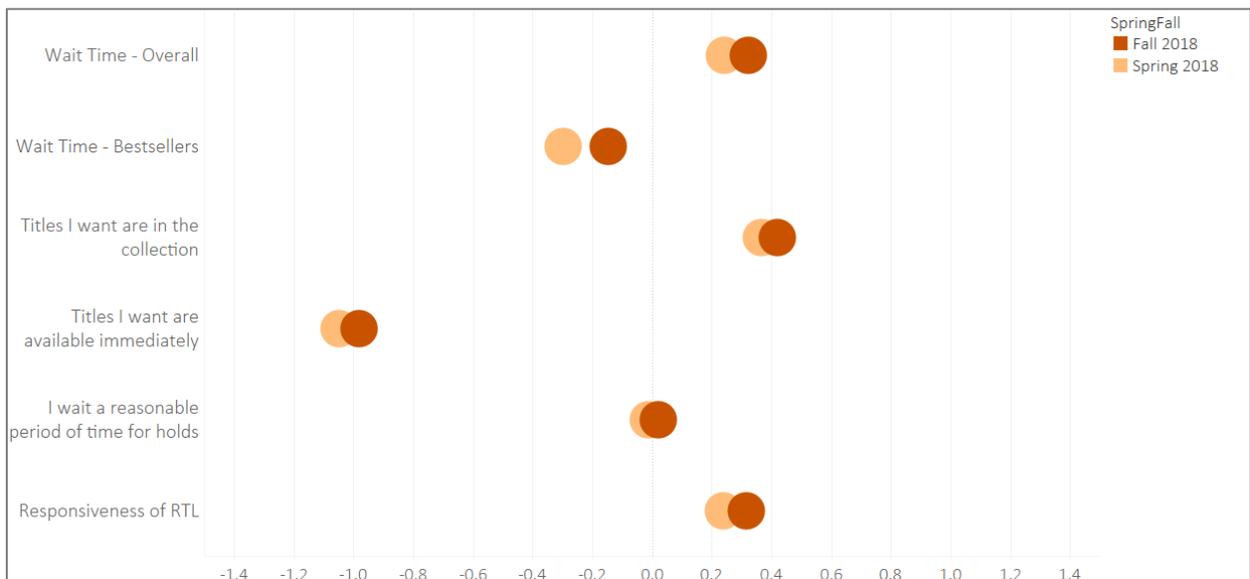
In March 2018, Advantage Plus was implemented for the WPLC collection. Advantage titles that have been owned for at least 30 days and have no holds/checkouts are now shared with the consortium collection.

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.



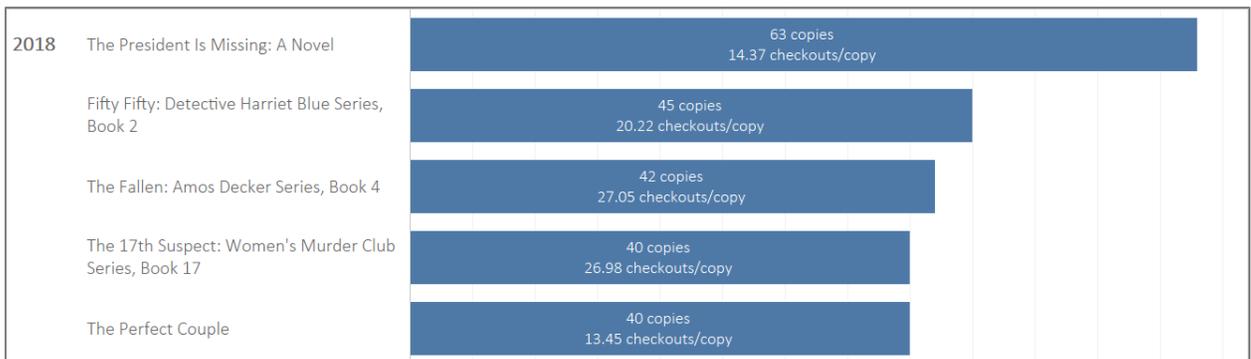
This overview shows us that while wait times have increased, satisfaction with the collection has also increased, albeit slightly. The satisfaction increase may be due in part to the recommendations for changes in purchasing guidelines.

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
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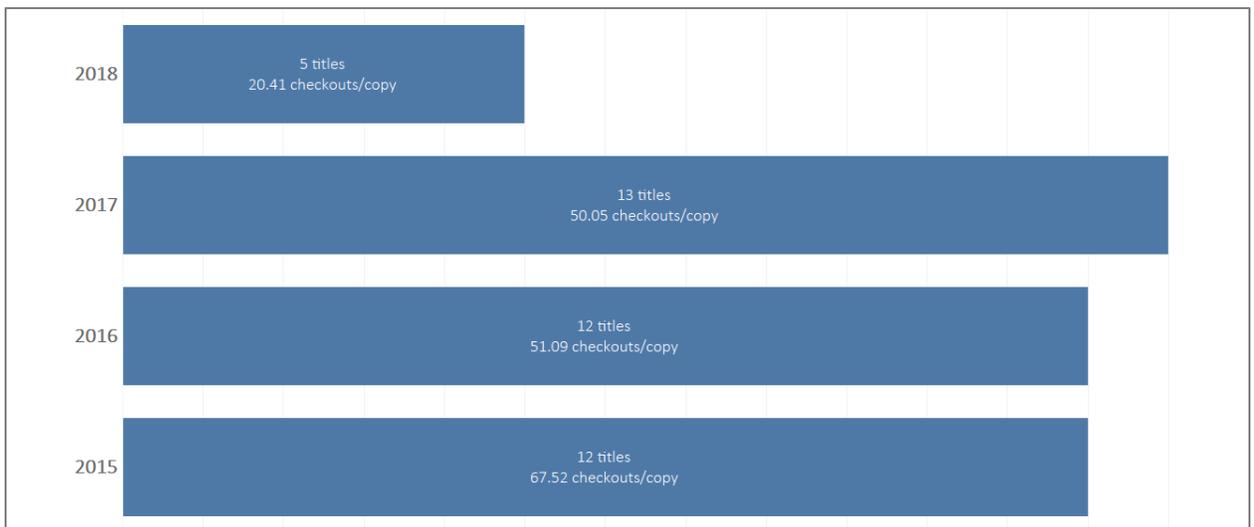
The following three recommendations have experienced implementation issues:

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 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.

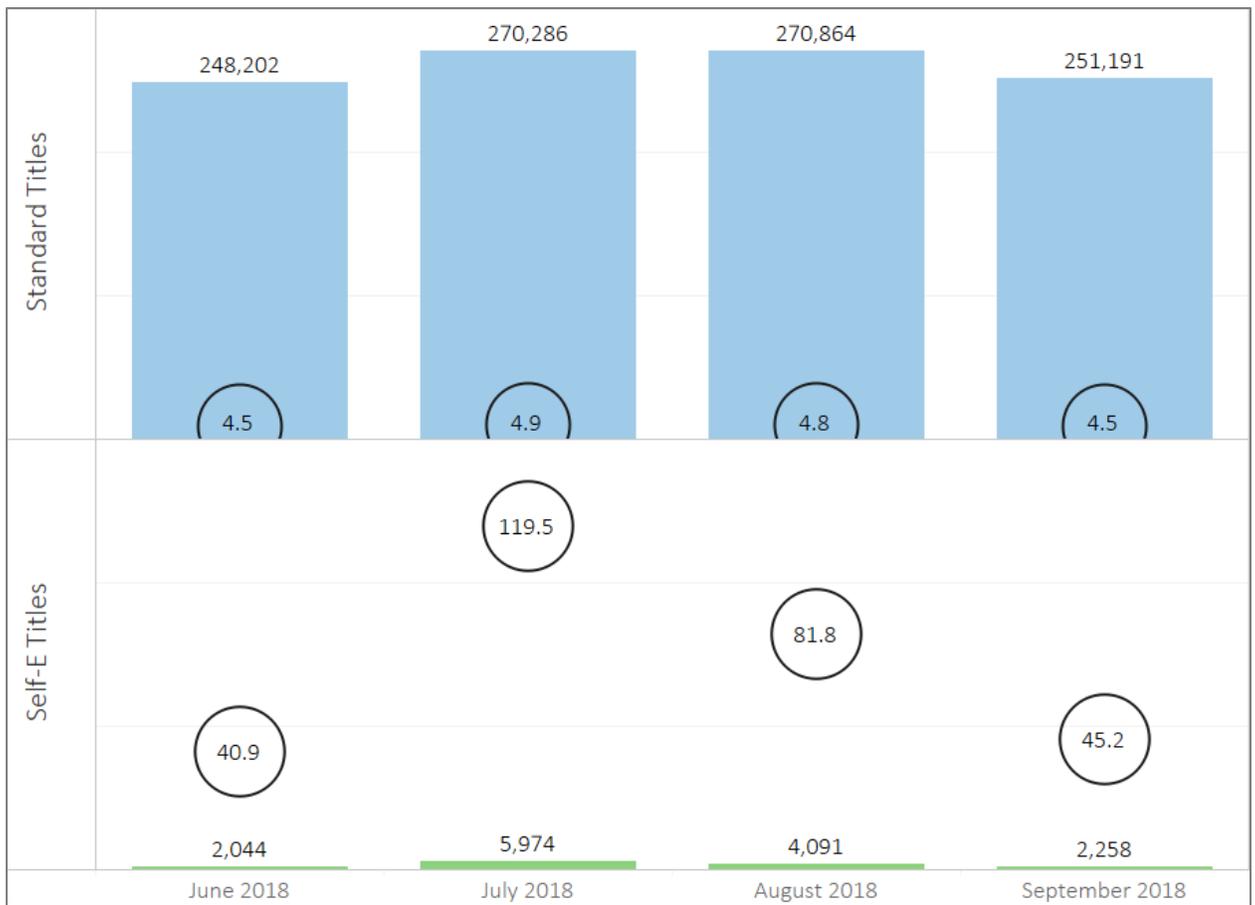


2. *Purchase more simultaneous use titles.*

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 (OCOU 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.