BLACK GOLD
COOPERATIVE LIBRARY SYSTEM

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Blackgold.org

REFERENCE AND ADULT SERVICES COMMITTEE AGENDA
10:00 a.m. Wednesday, May 10, 2023
MICROSOFT TEAMS MEETING

*Item accompanies the agenda.

1. **10:00 A.M. CALL TO ORDER** ─ FY 2022-23 Chair, Dominic Keen (LM), Recorder, Gillian Speicher (SM)

2. **ADOPT AGENDA** ─

3. ***APPROVAL OF MINUTES** ─ 11.09.22

4. **NEW BUSINESS** ─

    a. *Overdrive Guidelines – FY 2023-24 (BG) - Annually, we review the purchasing guidelines for the shared OverDrive collection.

    b. *Overdrive 'Notify Me' feature - In March 2023, OverDrive introduced a new feature called Notify Me. This tool can aid in the purchasing selection. Santa Paula has set this tool up for all of Black Gold to use and will explain the process to the RAS Committee.

    c. Overdrive vs. Libby – Review changes to the Overdrive app and discuss the possibility of replacing the 'Overdrive' label with "Libby' in Aspen.

    d. *Instant Messaging for Reference (PR) – Discuss options for instant messaging and if libraries are interested in offering the service.

5. **ROUNDTABLE** ─

6. **BLACK GOLD UPDATE** ─

7. **ITEMS TO BE FORWARDED** ─ (To Council or other committees)

8. **AGENDA BUILDING** ─

9. **NEXT MEETING** ─ 10:00 a.m., Wednesday, August 9, 2023 (TBD)

10. **ADJOURNMENT** ─

Distribution ─ email notice of web-posted agenda packet (available at www.ats.blackgold.org):

Dominic Keen, LM; Gillian Speicher SM; Joanne Britton SM; Karen Christiansen, PR; Brenda Goldy, SP; Elizabeth Saucedo, GV; Jody Thomas, CC; Glynis Fitzgerald, BG; BG Council.

REFERENCE AND ADULT SERVICES COMMITTEE MINUTES
10:00 a.m. Wednesday, November 9, 2022
WEBINAR

Attending: Carla (GOV), Glynis (BG), Gillian (SM), Justin (SP), Karen (PR), Theo (LOM)

*Item accompanies the agenda.

1. **10:04 A.M. CALL TO ORDER** — FY 2022-23 Glynis Fitzgerald (BG), Recorder, Gillian Speicher (SM)

2. **ADOPT AGENDA** — 1ˢ PR 2ⁿᵈ MM. Approved.

3. ***APPROVAL OF MINUTES** — 06.08.22 - 1ˢᵗ PR /2ⁿᵈ GOV. Approved.

4. **NEW BUSINESS** —

    a. Advantage Plus

        i. Titles will be shared from Advantage collection to Shared consortium collections

        ii. Purchasing branches will purchase based on the following factors: bestsellers, holds, gaps in collections & patron recommendations

        iii. Next steps will be for each branch to set up Advantage Plus. PR & SP have finished set up. Set up would potentially include:

            1. All titles

            2. All lending models

            3. Preorders

            4. Automatically update or Manually review each item

        iv. Consortium holds: first patron on hold list, branch items: prefer my patron.

    b. The Shelf: streaming content which has a collection of Spanish Language movies/tv

        i. Glynis will set up a potential demo

5. **ROUNDTABLE** —

    a. **SP:** uploaded SORA collection to Advantage Plus. Hired new library assistant, SP was a voting center

    b. **MM:** Received Zip book grant and Copycat grants for Adulting 101 & Dia. Hiring for assistant library technicians and Librarian III

    c. **GOV:** Goleta almost fully staffed. Buellton & Solvang are in the process of hiring/interviewing for more staff

    d. **LOM:** Processing orders from Baker & Taylor, received Zip book grant

    e. **PR:** Hiring City Librarian, will be hiring Tech Services Librarian (emphasis on tech related duties), EDI working for Baker & Taylor and are currently working on EDI for Midwest Tapes.

6. **BLACK GOLD UPDATE** —

    a. Capira will be upgraded in Feb. 2023

    b. Delivery from SLO/SB will be next week. May be winding down

7. **ITEMS TO BE FORWARDED** — Advantage Plus sharing update

8. **AGENDA BUILDING** —

9. **NEXT MEETING** ─ 10:00 a.m., Wednesday, February 8, 2022 (LM)

10. **ADJOURNMENT** ─ 1st /2nd   Approved.

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org):

Dominic Keen, LM; Gillian Speicher SM; Joanne Britton SM; Karen Christiansen, PR; Justin Formanek, SP; Glynis Fitzgerald, BG; Teresa Van Doren (BG); BG Council., Eric Castro, CC; Carla Mason, GOV

		PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
TOPIC:	OverDrive Guidelines – FY23/24		
SUBMITTED BY:	Glynis Fitzgerald		
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

	BACKGROUND STATEMENT		
BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	Annually, we review the purchasing guidelines for the shared OverDrive collection. We now have the preliminary OverDrive Budget for FY23/24, so it is time to plan for the allocation of this budget for Adult, Youth and Spanish titles. See attached Draft of the Digital Collection Guidelines for 2023-2024 Review the draft to determine if any rule changes need to be made. Additional reports included for review and insight are -Partner Analysis Review … May 2023 -May 2022-April 2023 Trends		

	OUTCOME(S)		
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Determine the new allocation of funding for the various collections to be purchased for the Shared OverDrive account. Determine what, if any, rule changes should be made to the Guidelines.		
OTHER COMMENTS:			

Black Gold Cooperative Library System
Digital Collection Guidelines – 2023-2024

The Black Gold Cooperative Library System provides eContent to its patrons. The collection is intended to provide downloadable versions of:
- Popular adult, young adult, and children's unabridged fiction and non-fiction eBook and eAudiobooks in English and Spanish (when available)

When purchasing titles for the collection, please use the following guidelines:

- Relevance to interests and needs of the community
- Requests and demand from patrons
- Anticipated demand or critical review and publicity
- Local significance of the author or subject
- Relevance to the existing collection's strengths and weaknesses
- Current or historical significance of the author or subject
- Reputation and/or significance of the author/artist and publisher/producer
- Relevance to the experiences and contributions of diverse populations
- Price, availability in relation to Library materials budget

Fiction/Non-Fiction
Analysis of physical circulation shows that Fiction titles are checked out at a ratio of 2:1 over Non-Fiction titles. RAS Committee has suggested that this same ratio be used when purchasing eBooks and eAudiobooks.

Formats
- For eAudiobooks, MP3 audiobook titles should be purchased as they are compatible with both Windows and Mac computers.
- For eBooks, the Kindle and EPUB format should be purchased when possible, and PDF if not.

Lending model

Available lending models include:

- OC/OU - One Copy/One User - does not expire
- Metered Access (MA)
    - MA: time ex. MA: 24 months - usually 24 or 12 months - if able to choose between them for initial buy, consider patron interest longevity
    - MA: checkouts ex: MA:26 checkouts - expires after 26 checkouts
    - MA: either. ex: 24 months or 52 checkouts, whichever comes first
- SU - Simultaneous use
    - MA: 100 checkouts (concurrent use) - lets up to 100 people check out at the same time.
    - SU should ideally be used mainly for hold management.

When available, purchase the OC/OU copy, otherwise consider MA content. If given a choice between MA time and MA checkouts, checkouts are normally the better option as they do not expire. If adding additional copies, choose a shorter time period (12 months over 24 months), to allow more copies to fill holds while the title is new and in demand. Consider patron usage behavior when deciding.

Spending amounts $8,000 suggested - $560/month increase

The monthly amounts for each category beginning July 1, 2023 are:

- eAudiobooks - **$1,600**
- eBooks - **$1,400**
- Youth Services (including teen items) - (combination eAudiobooks and eBooks) **$800**
- Metered/Expired and Duplicates (purchased by Black Gold) **$3,540**

- Spanish - (combination of adult and youth) **$300** quarterly

Purchasing Schedule
The purchasing schedule is set to allow each library the opportunity to purchase twice during the year. The rotation schedule cycles south-to-north.

Adult
ebooks and eAudiobooks

July – LOM	Aug – SM	Sep - PR	Oct - SP
Nov – CC	Dec – GOL	Jan – LOM	Feb - SM
Mar – PR	Apr – SP	May - CC	Jun – GOL

Youth Services
eBooks and Audiobooks

July – SP	Aug – CC	Sep - GOL	Oct - LOM
Nov – SM	Dec – PR	Jan – SP	Feb - CC
Mar – GOL	Apr – LOM	May - SM	Jun – PR

Spanish
Purchase quarterly

Jul – SM	Oct - SP	Jan – CC	Apr - GOL

The order should be placed no later than the 15th of every month. If a library is not able to meet this deadline, please inform Glynis, who will contact an alternate library to complete the purchase.

Monthly Purchasing Considerations
To ensure consistent collection development, please follow these guidelines for purchasing content access:
1. Review suggestion carts from fellow purchasers.
2. Check to see if titles are available on hoopla before purchasing on Overdrive, especially for eAudiobooks.
3. Review patron recommendations (evaluate value and continued interest, especially for non-fiction titles).
4. Check against bestseller lists whether any relevant titles were missed last month.
5. Consider current sales and series that need completion.

Purchaser Recommendations

Purchasers can add titles to a permanent suggestion cart at any time during the year. When reviewing the cart for purchase:

1. Delete titles that have a date for first copy bought or otherwise are listed as owned by the consortium.
2. Select titles you elect to purchase and move them to the cart you're sending in. This will ensure that titles in the cart have not been purchased already.

Patron Recommendations

Use the Recommendations report from the Insights/Title Activity Reports tab. Select the last 6 months and all branches. It will show a list of patron requests ranked by number of recommendations. Consider any title with more than 5 suggestions for purchase.

A weekly cart is generated for titles recommended by library patrons. One report is for eAudiobooks and one for eBooks. Carefully review titles on the list with more than 5 recommendations, as these are through all time and may no longer be relevant. The cart can then be deleted.

Guidelines for Duplicates

In order to maintain a low enough wait time for popular titles, please follow these guidelines for handling content access:

- When the holds ratio is over 20:1 per copy
  - Get up to 4 extra copies before looking into providing SU content
  - Be cognizant of the best cost/value ratio when purchasing.
- Review collection for duplicates by the 15th and the 30th of each month

Guidelines for Metered/Expiring Content and Backlist

The intention of this grouping is to have a holistic approach to the digital catalog and ensure access to older titles patrons are continuously looking for.

To maintain popular titles that might be expiring, please follow these guidelines for handling metered access and expired content on OverDrive:

- Black Gold will review the Expired with Holds carts and purchase copies as needed to satisfy holds when there are more than 3 holds in excess of checkouts remaining on a title.

- Black Gold will review the remaining titles on the Expired with Holds carts for # of past checkouts, titles that are part of a series, titles on the NY Times Bestsellers list, Classics and titles of enduring interest that we would like to keep.
- Titles that have expired and are not repurchased will be weeded from the OverDrive collection. Patrons are not notified that their hold has been removed since OverDrive does not have a way of doing so automatically.
- Only titles that have been previously purchased for the cooperative will be re-purchased. Advantage titles purchased by a library that did not also have a cooperative copy will not be added.

Guidelines for Un-weeding titles

If a title you're considering purchasing is listed as "Weeded" you may consider un-weeding it and repurchasing. Consider that we've owned it previously and the circulation it had. Be aware that un-weeded titles need to be purchased the same day or they will revert back to weeded overnight.

Selectors and Marketplace Training

Staff members purchasing for OverDrive for the first time will need to complete an online training on the site, found on the Support tab, before ordering. Once submitted, purchase orders on Content Reserve cannot be cancelled and titles will appear on our website automatically, so it is important that staff be aware of how to use the online product to avoid inadvertent purchases.

Curated collections

The Collections displayed on the web page will be updated by Overdrive quarterly. Jurisdictions can pitch idea requests or create displays themselves as desired.
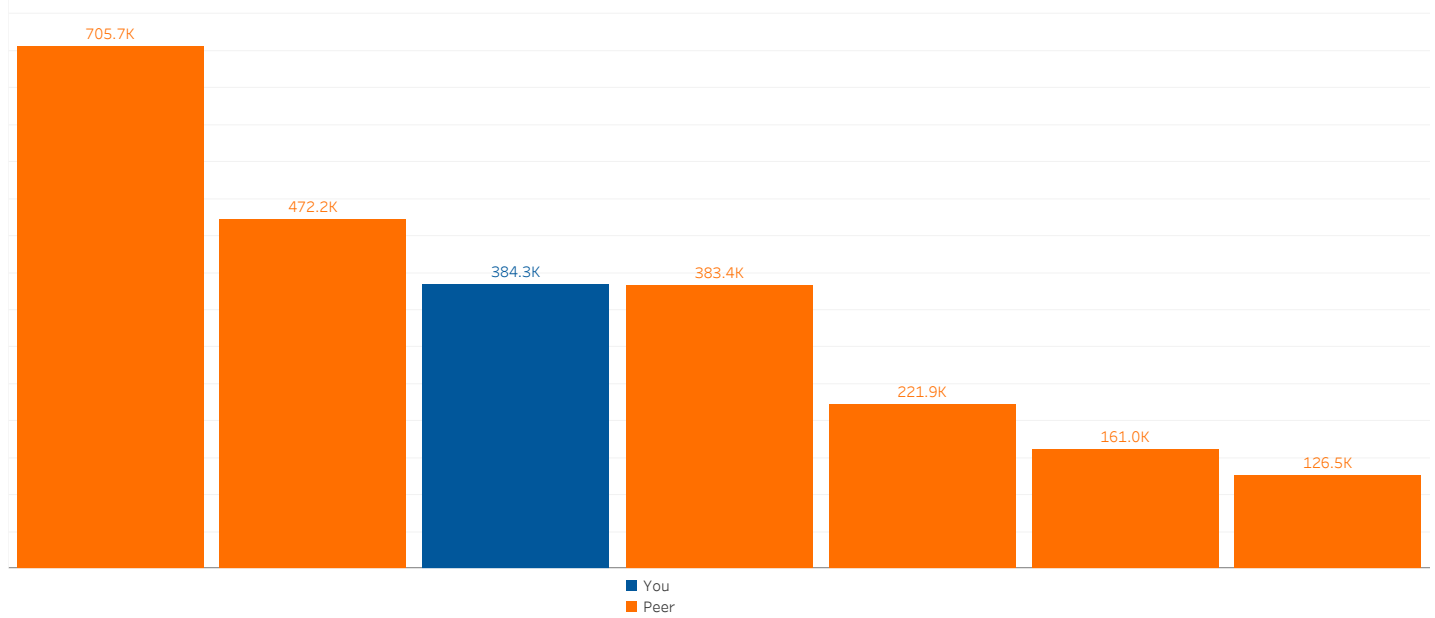
Black Gold Cooperative Library System (CA)
Partner Analysis Review

Kevin Coon | Account Manager

OverDrive

How many people are served by each libary?
Service area population size

705.7K

472.2K

384.3K

383.4K

221.9K

161.0K

126.5K

■ You
■ Peer

OverDrive

How much of the collection budget is invested in OverDrive?
Percent of total collection expenditures spent with OverDrive last year

47.9%

39.4%   39.3%

All-star average: 43.4%

24.5%

21.5%

Library & Peer average: 29.0%

15.5%   15.0%

■ You
■ Peer

OverDrive

Business Systems and Analytics // May 4, 2023

How frequently is new content added?
Average number of purchases per week over the last 90 days

All-star Max: 35.8

16.0   15.9   11.1   10.7   9.1   5.9   All-star Min: 4.0

■ You   ■ Peer

OverDrive

Business Systems and Analytics // May 4, 2023
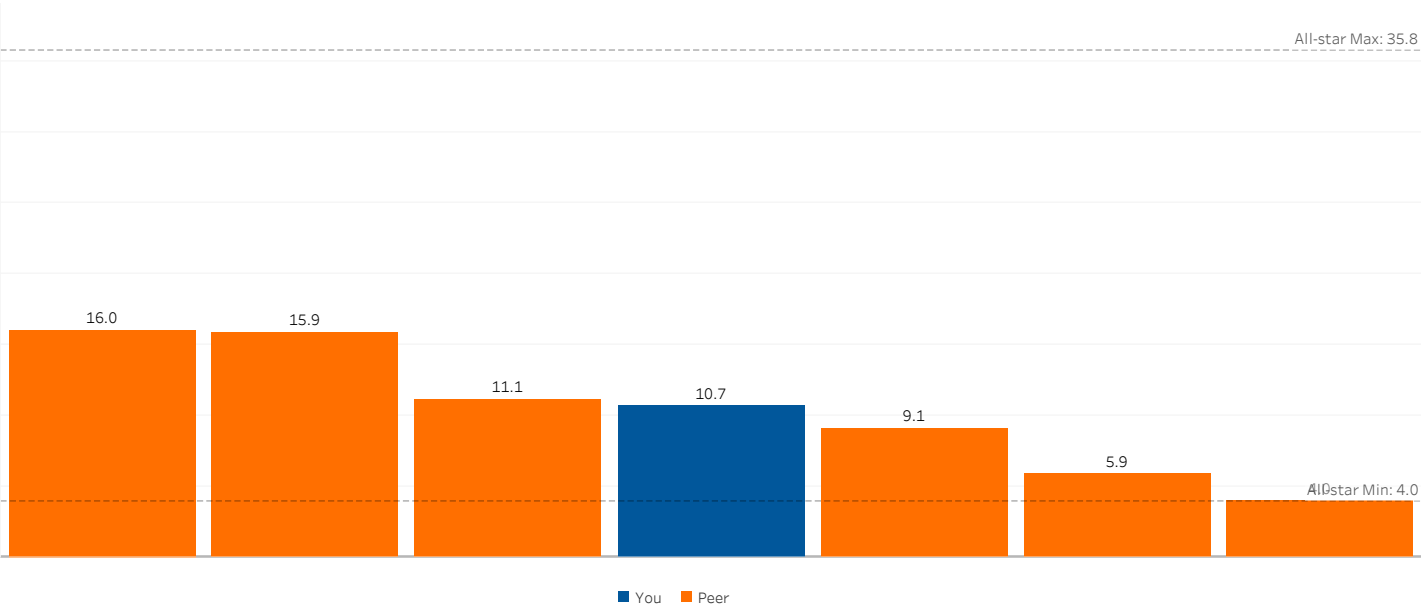
How much digital content is purchased per capita?
Average spend per service area resident last year

Overall All-star Spend per SAR: $2.22

$1.78

$1.38

$1.31

$1.19

$0.73

$0.55

$0.26

■ You ■ Peer

OverDrive

Business Systems and Analytics // May 4, 2023
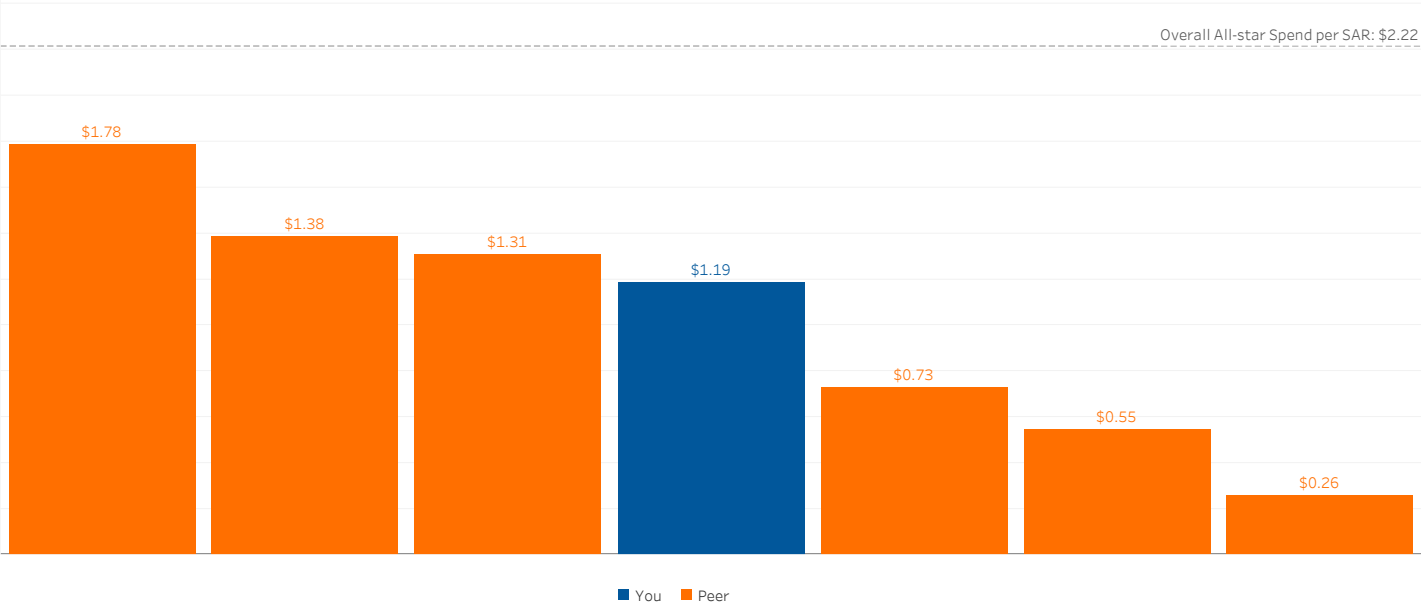
How long have users been waiting for active holds?
Current average waiting period

All-star Max: 66.1

All-star Min: 18.6

26.7　35.3　44.7　46.8　61.0　63.1　66.1

■ You ■ Peer

OverDrive

Business Systems and Analytics // May 4, 2023
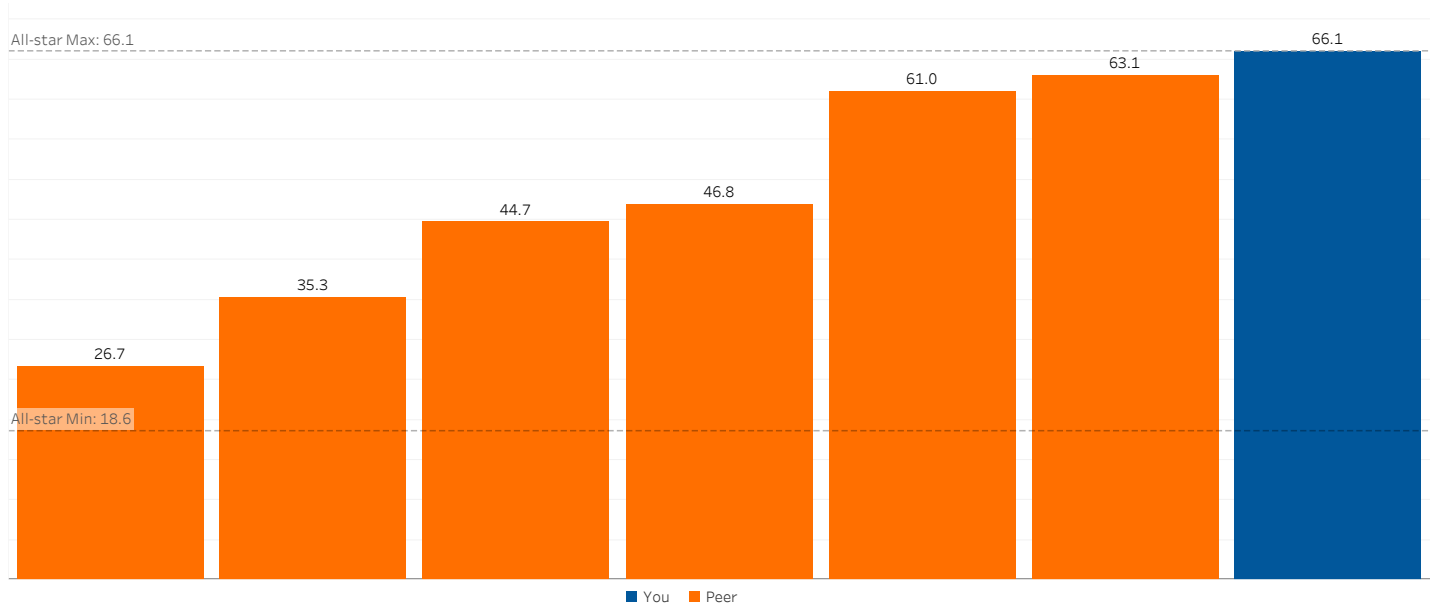
How have demand and wait time changed in the last 12 months?
Average daily active holds (top) and average waiting period (bottom)

Fiscal Year / DayDate (Months)
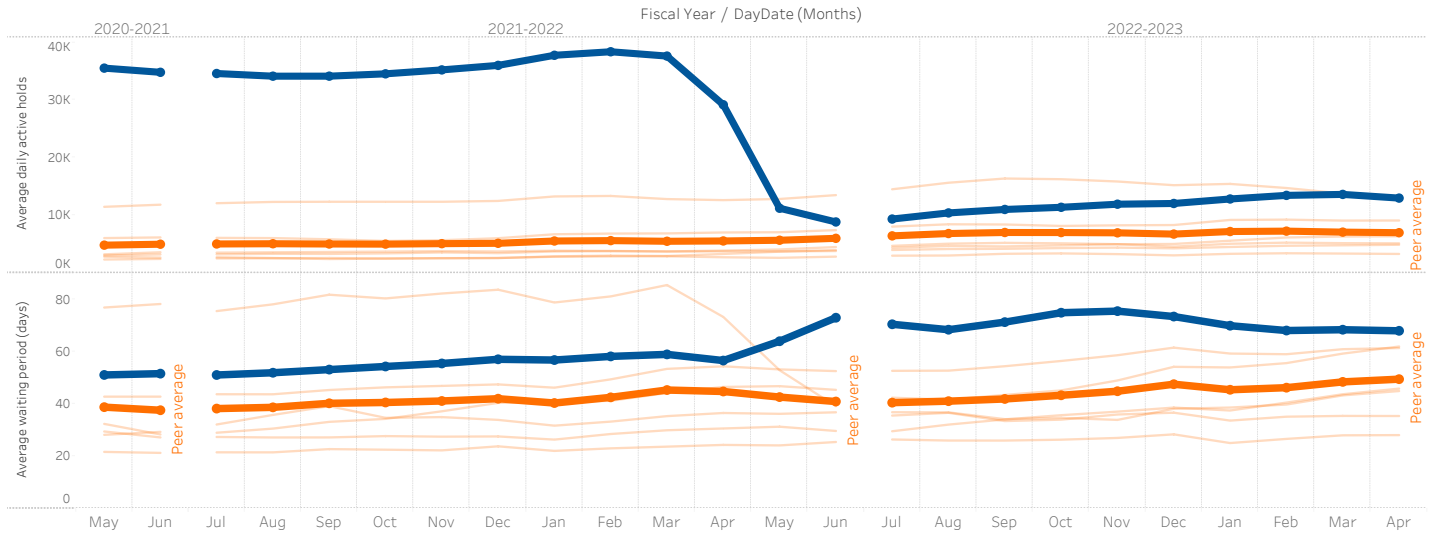
In the last 12 months, you have had daily active holds (23.3K) compared to your peers (5.9K), and your average waiting period (62.4) has been your peers' (42.4).

■ You ■ Peer

OverDrive

Business Systems and Analytics // May 4, 2023

How many people use the digital collection each month?
Unique users who made a checkout or placed a hold

Fiscal Year / DayDate (Months)

2021-2022   2022-2023

Unique users

Peer average

Legend: ■ Target ■ Peer

X-axis: May, Jun, Jul, Aug, Sep, Oct, Nov, Jan, Feb, Mar, Apr

Y-axis: 0, 500, 1000, 1500, 2000, 2500, 3000, 3500, 4000, 4500, 5000, 5500, 6000, 6500, 7000

OverDrive

Business Systems and Analytics // May 4, 2023
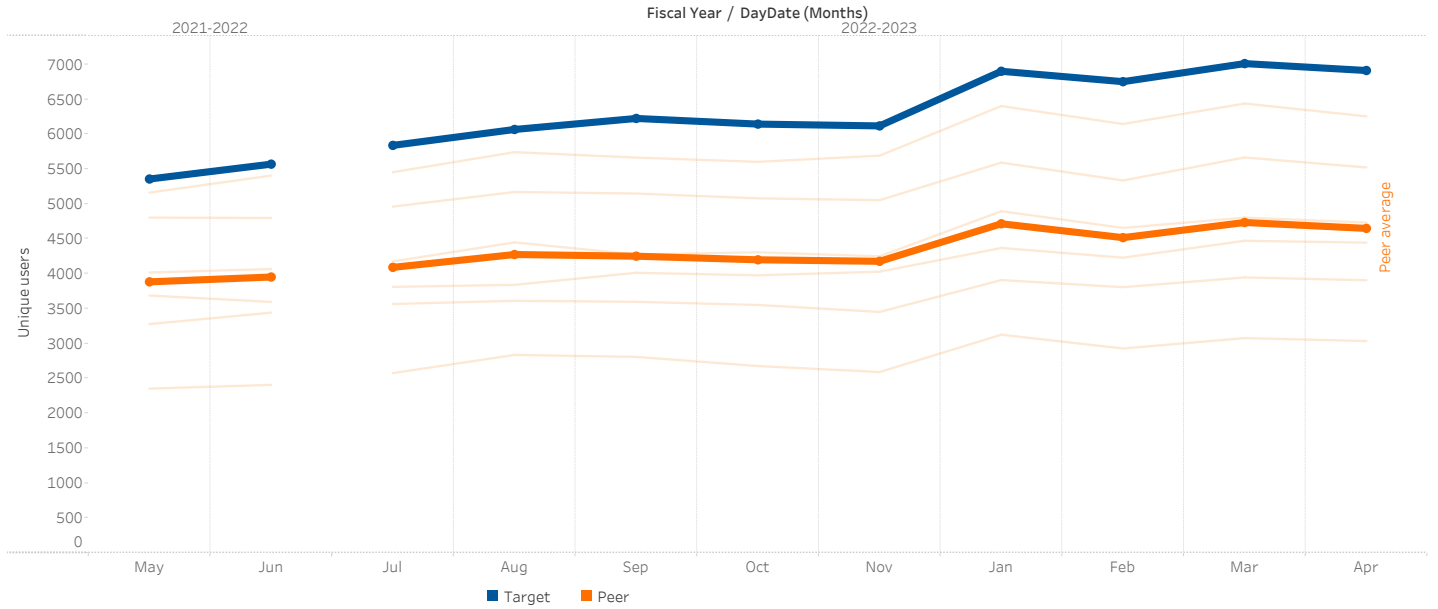
Checkouts
Rolling 12 months with year-over-year growth

May 21-22	June 21-22	July 22-23	August 22-23	September 22-23	October 22-23	November 22-23	December 22-23	January 22-23	February 22-23	March 22-23	April 22-23
25,591	26,276	28,057	27,554	26,339	26,728	25,249	26,099	29,094	26,429	29,544	28,558
-61% YOY	-60% YOY	-58% YOY	-58% YOY	-59% YOY	-58% YOY	-60% YOY	-60% YOY	-58% YOY	-57% YOY	-57% YOY	-50% YOY

OverDrive

Business Systems and Analytics // May 4, 2023
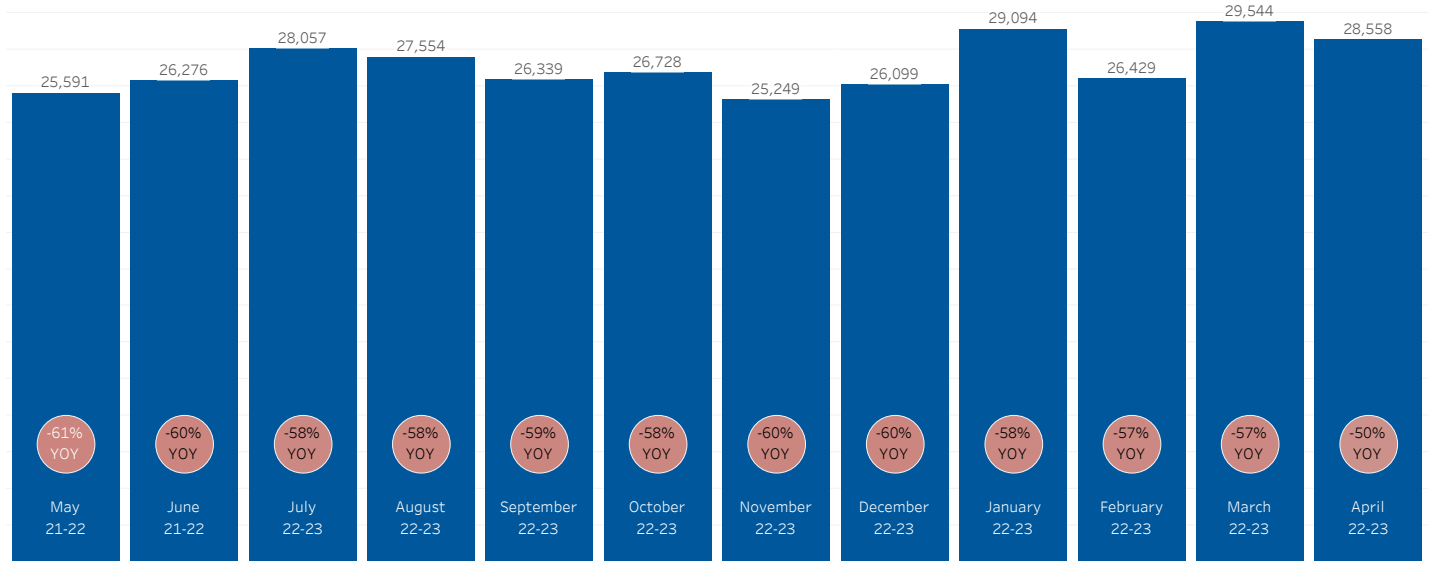
Checkouts and Spend
Rolling 24 months with year-over-year growth

OVERDRIVE CONFIDENTIAL - PARTNER USE ONLY

Business Systems and Analytics // May 4, 2023
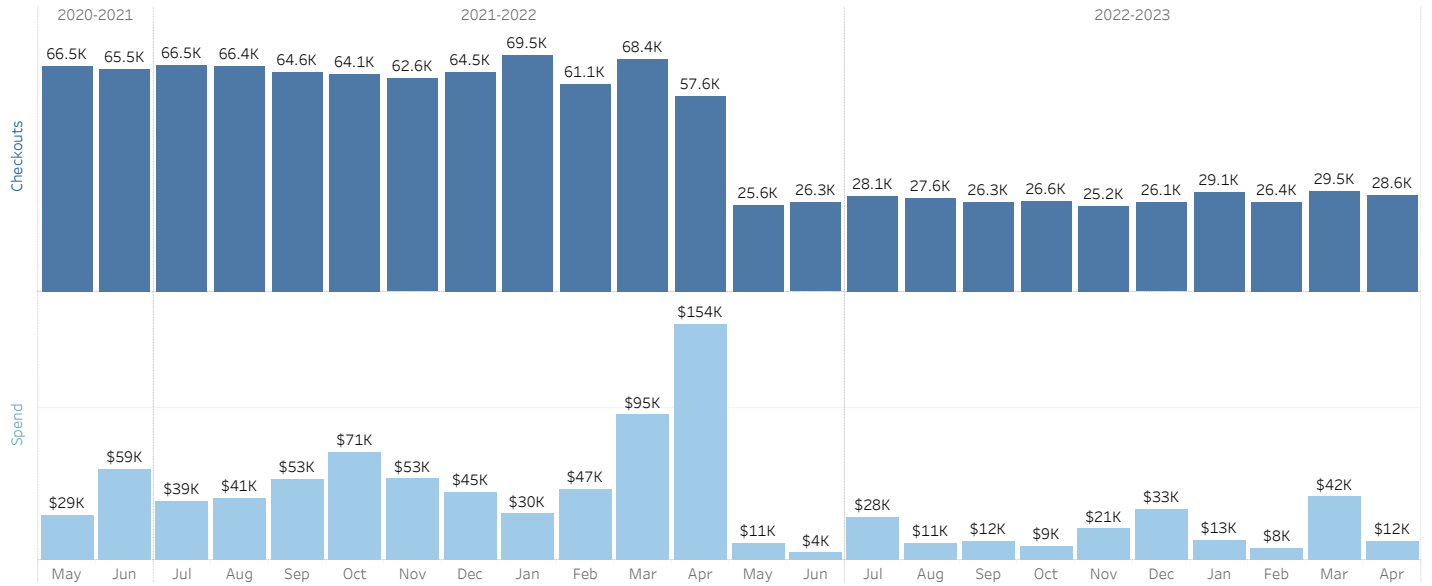
Top 20 subjects by checkouts: ebook
Rolling 12 months of checkout and spend

% of Total

Checkout-spend efficiency

% of Total Checkouts
% of Total Spend
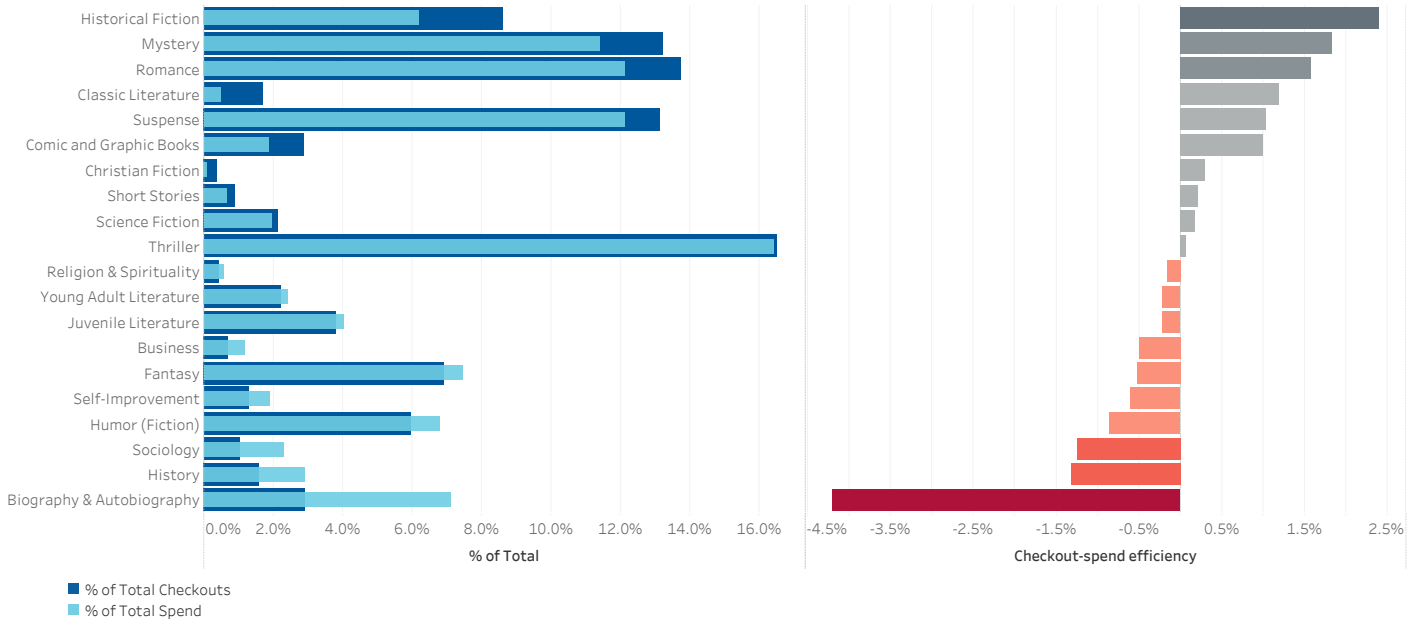
OverDrive

Top 20 subjects by checkouts: audiobook
Rolling 12 months of checkout and spend

% of Total   **Checkout-spend efficiency**

■ % of Total Checkouts   ■ % of Total Spend
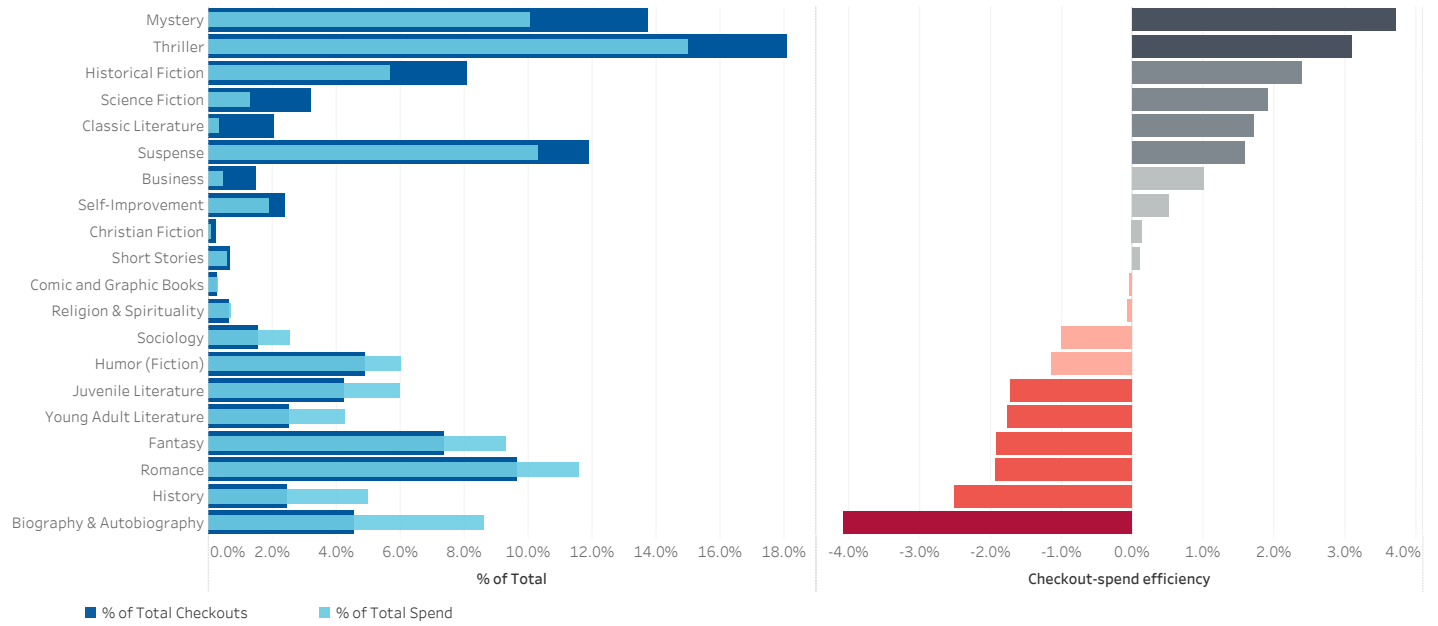
OverDrive

Active Holds and Average Waiting Period over Time

Active holds and average waiting period are both calculated for the last day of the month.

OverDrive

Business Systems and Analytics // May 4, 2023

Unique Users with Checkouts

| 2020-2021 | 2021-2022 | 2022-2023 |

Unique Users

May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
13.3K	13.1K	13.1K	13.4K	13.3K	13.0K	13.0K	13.3K	13.9K	13.4K	13.9K	13.4K	5.0K	5.3K	5.5K	5.7K	5.8K	5.7K	5.7K	5.9K	6.3K	6.3K	6.5K	6.4K
												-62% YoY growth	-60% YoY growth	-58% YoY growth	-57% YoY growth	-56% YoY growth	-56% YoY growth	-57% YoY growth	-56% YoY growth	-54% YoY growth	-53% YoY growth	-53% YoY growth	-52% YoY growth

Unique users who had a checkout in the month indicated. This does not reflect the number of users who had active checkout each month.
For example, if a user had a checkout in May and the checkout was still active in June (but they did not place another checkout in June), then they would be counted towards unique users in May, but not June.

OverDrive

Unique Users with Holds

	2020-2021		2021-2022												2022-2023

Unique Users

May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
9.7K	9.4K	9.6K	9.8K	9.7K	9.5K	9.7K	9.8K	10.5K	9.7K	10.1K	9.2K	3.2K	3.2K	3.5K	3.5K	3.4K	3.5K	3.4K	3.6K	4.2K	3.8K	4.0K	4.0K

May: -67% YoY growth
Jun: -66% YoY growth
Jul: -64% YoY growth
Aug: -65% YoY growth
Sep: -65% YoY growth
Oct: -63% YoY growth
Nov: -65% YoY growth
Dec: -63% YoY growth
Jan: -60% YoY growth
Feb: -61% YoY growth
Mar: -60% YoY growth
Apr: -57% YoY growth

Unique users who added a hold in the month indicated. This does not reflect the number of users who had active holds each month.
For example, if a user placed a hold in May and the hold was still active in June (but they did not place another hold in June), then they would be counted towards unique users in May, but not June.
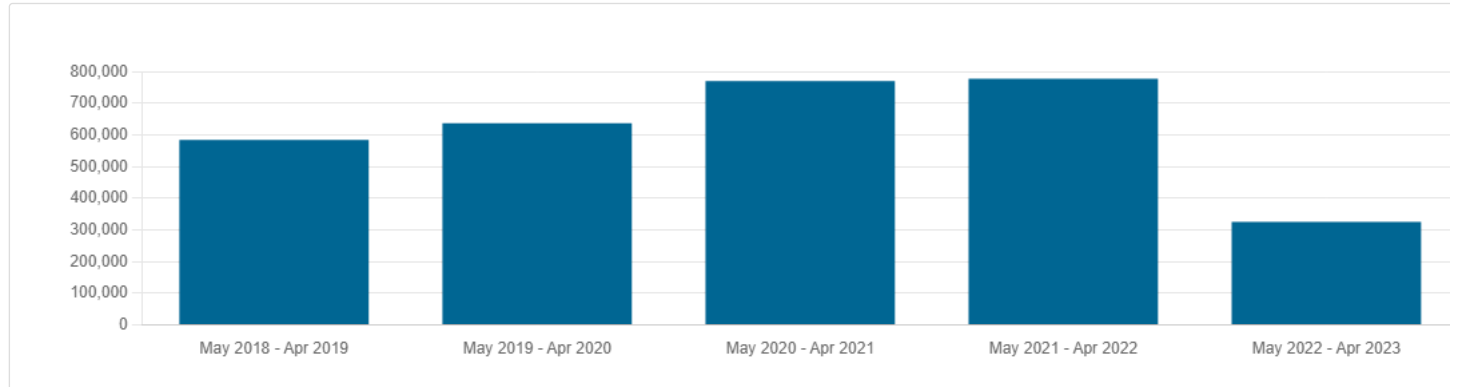
OverDrive

Business Systems and Analytics // May 4, 2023

Black Gold - OverDrive Trends
May 2022 - April 2023
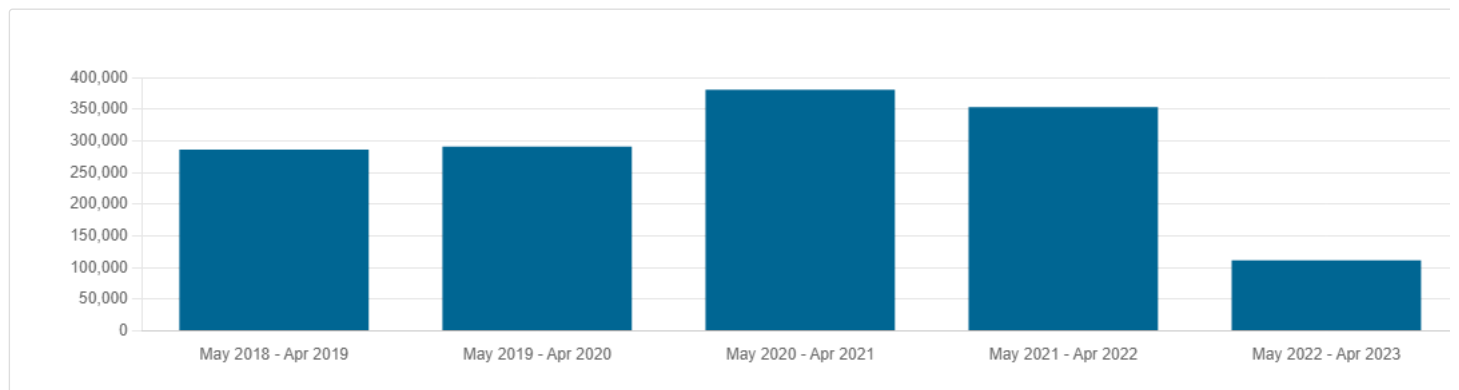
Trends

Year over year

Checkouts: Year over year

Unique users: Year over year
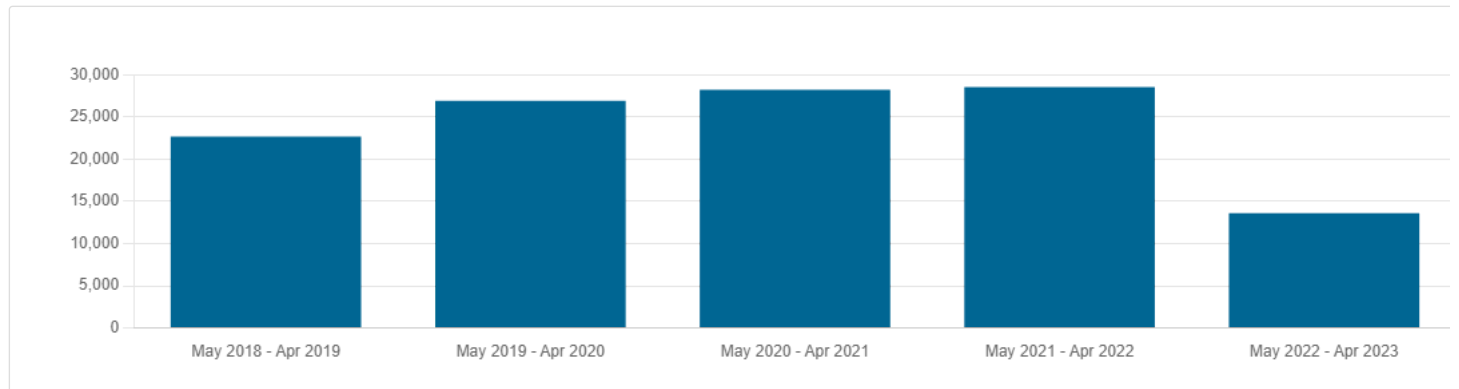
Holds: Year over year

User activity

Checkouts by format

Total: **1,102,922**

LAST 12 MONTHS · LAST 24 MONTHS   View Checkouts report

Legend: Ebooks · Audiobooks · Magazines
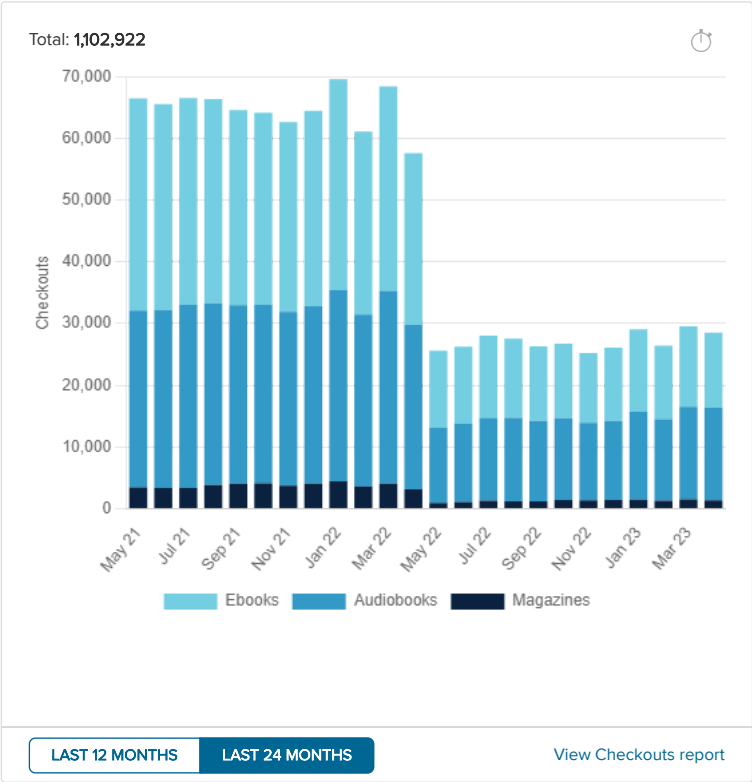
Checkouts by title audience

Total: **1,102,922**

Legend: Juvenile · Young adult · Adult

"Title audience" is a category assigned to titles in Marketplace.

LAST 12 MONTHS · LAST 24 MONTHS   View Checkouts report
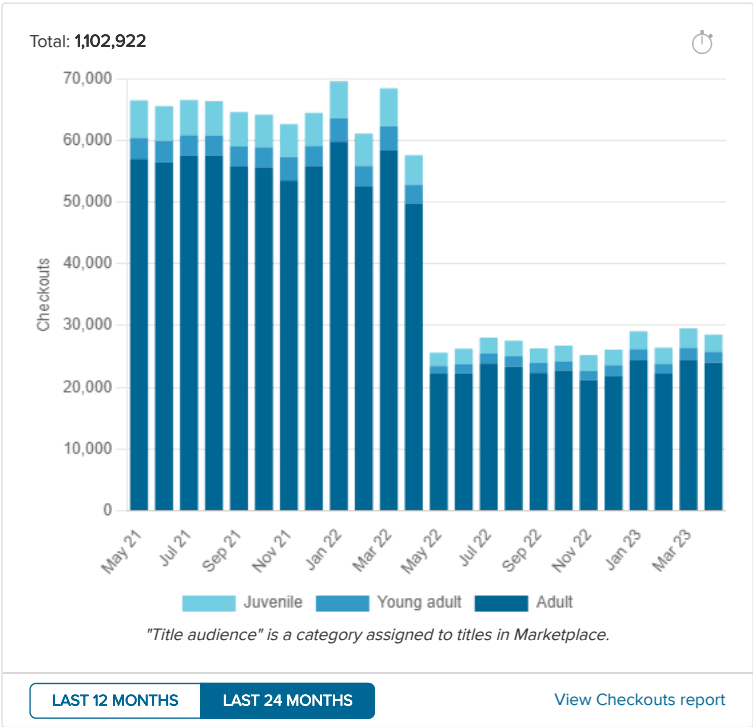
Activity and purchases (USD)

Checkouts & holds / Purchases chart, May 21 through Mar 23.

Legend: Checkouts · Holds · Purchases

"Units purchased" excludes Cost Per Circ (CPC), Simultaneous Use (SU), and external services.

LAST 12 MONTHS | LAST 24 MONTHS

View Purchase orders report

Unique users

Users chart, May through Apr.

Legend: Previous year · This year

View Unique users report
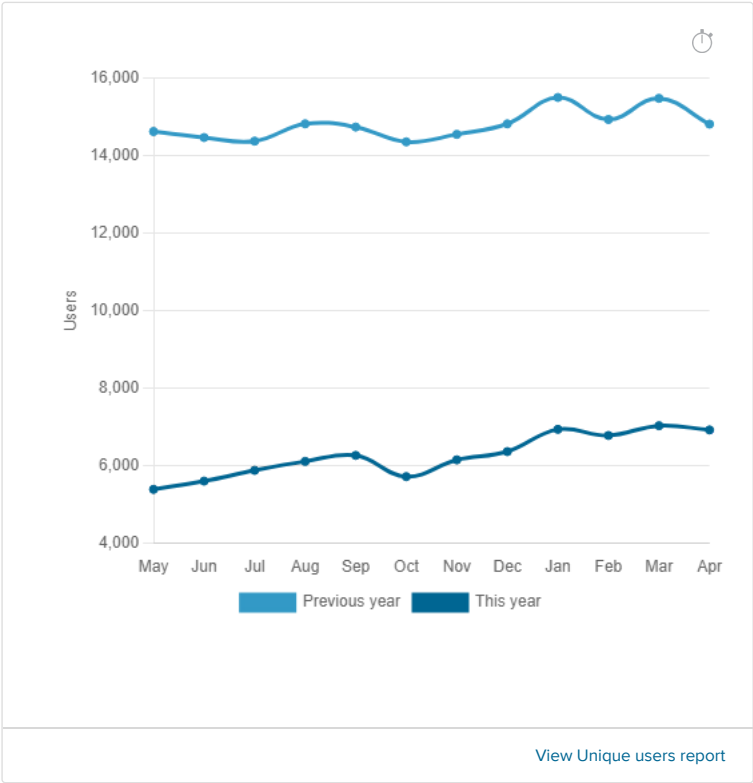
Notes:
Trends data may vary slightly from full report data (found on the **Reports** page).
Consortia and Advantage members: **Trends** activity includes Advantage-owned titles for all Advantage accounts in your Consortium.

TOPIC:	OverDrive Notify Me feature	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☐ 3
SUBMITTED BY:	Glynis Fitzgerald		
TYPE OF ITEM:	☒ For Discussion ☐ For Recommendation ☐ Other: _____		

	BACKGROUND STATEMENT		

BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	In March 2023, OverDrive introduced a new feature called Notify Me. This tool can aid in the purchasing selection. Santa Paula has set this tool up for all of Black Gold to use and will explain the process to the RAS Committee.

	OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	All staff that purchase from OverDrive will understand and utilize the Notify Me feature
OTHER COMMENTS:	

Notify Me data in OverDrive Marketplace

Notify Me tags data is available for your library to leverage in new tools and dashboards. It includes:

- **Shopping data:** Notify Me tags will display on search results and title details pages in Marketplace. You will see both the number of tags and a chart to visually indicate trending interest. There will also be a new advanced search, filter, and sort options for titles with Notify Me tags. *Coming June 1. Requires* **Create/view carts** *permission.*

- **Patron Interests Manager plans:** A new purchasing tool will allow you to create on-demand reports and automated carts if you choose for titles with Notify Me tags based on format, lending model, language, publisher, audience, preorder status, price, and more. *Now available for you to explore. Requires* **Purchasing tools** *permission.*

- **Patron interests dashboard:** New charts and reports on the Patron interests dashboard will include Notify Me data to track titles with the most Notify Me tags, review activity trends for titles in your collection with historical Notify Me interest, and track the average number of Notify Me tags per unique user over time. *Now available for you to explore. Requires* **Reports** *permission.*

MEETING DATE:	May 10	ESTIMATED TIME FOR ITEM:	5-10 minutes
TITLE OF ITEM:	Instant Messaging for Reference	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:	Eric P. Lashley – Paso Robles		
TYPE OF ITEM:	☒ For Discussion ☐ For Decision/Request Motion ☐ Other: _____		

BACKGROUND STATEMENT

BACKGROUND: *Describe why you are bringing this item before council. What problem are you trying to solve? List information that would be helpful for decision making such as committee recommendations, pros/cons.*	I came from a library that allowed patrons to text or instant message our librarians. We usually assigned the reference desk to handle communicating via instant messaging. It was a very popular service. I'm curious if the Black Gold libraries would like to pursue this type of service.

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	I would like to see the committee make a recommendation to the board as to whether or not to pursue an instant messaging service.
OTHER COMMENTS:	