



REFERENCE AND ADULT SERVICES COMMITTEE AGENDA 10:00 a.m. Wednesday, May 12, 2021 WEBINAR

<https://blackgold.webex.com/blackgold/j.php?MTID=m62d682950dd354f532afd37444214e75>

Meeting number: 182 676 7002

Password: 051221

Join by phone:

1-650-479-3208 Call-in toll number (US/Canada)

Access code: 182 676 7002

*item accompanies the agenda.

1. **10:00 A.M. CALL TO ORDER** – FY 2020/21 Chair: Beate Bjoerklund (SB), Presiding. Recorder: Brent Field (GV)
2. **ADOPT AGENDA** –
3. ***APPROVAL OF MINUTES** – 02.10.21
4. **OLD BUSINESS** –
5. **NEW BUSINESS** –
 - a. *PressReader Demo
 - b. *Overdrive Collection Guidelines FY22 (SB)
6. **ROUNDTABLE** –
7. **BLACK GOLD UPDATE** –
8. **ITEMS TO BE FORWARDED** – (To Council or other committees)
9. **AGENDA BUILDING** –
10. **NEXT MEETING** – 10:00 a.m., Wednesday, August 12, 2021
11. **ADJOURNMENT** –

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

Beate Bjoerklund, SB; Dominic Keen, LM; Gillian Speicher SM; Joanne Britton SM; Sharon Coronado, SLO; Karen Christiansen, PR; Justin Formanek, SP; Brent Field (GO); Glynis Fitzgerald, BG; Teresa Van Doren (BG); BG Council; [File]



REFERENCE AND ADULT SERVICES COMMITTEE MINUTES
10:00 a.m. Wednesday, February 10, 2021
WEBINAR

*item accompanies the agenda.

Attending: Bea (SB), Glynis (BG), Teresa (BG), Gillian (SM), Sharon (SLO), Karen (PR), Justin (SP), Dominic (LM), Brent (GV)

1. **10:00 A.M. CALL TO ORDER** – FY 2020/21 Chair: Beate Bjoerklund (SB), Presiding. Recorder: Brent Field (GV)

2. **ADOPT AGENDA** –1st __GV____ 2nd __SP____ MOTION CARRIED. APPROVED.

3. ***APPROVAL OF MINUTES** – 08.12.20 1st __GV____ 2nd __PR____ MOTION CARRIED. APPROVED.

4. **OLD BUSINESS** –

None

5. **NEW BUSINESS** –

a. *Overdrive Unweeding (SB)

SB OD Advantage titles auto weeded but have holds, need to be re-added. Proposed that all purchasers get weeding permissions. 1st GV 2nd PR MOTION CARRIED. APPROVED

b. *Overdrive Magazine Titles (BG)

3000+ magazine titles available from Overdrive to add to catalog. Should all titles be added or a select group? All jurisdictions but SLO vote to add all 3000 titles to catalog. MOTION APPROVED

6. **ROUNDTABLE** –

7. **BLACK GOLD UPDATE** –

Delivery schedule may go to every four weeks from current three-week frequency.

Since RB digital checkout stats end March 31, access OD magazine checkout stats in Overdrive Marketplace.

8. **ITEMS TO BE FORWARDED** – (To Council or other committees)

None

9. **AGENDA BUILDING** –

None

10. **NEXT MEETING** – 10:00 a.m., Wednesday, Wednesday, May 12, 2021

11. **ADJOURNMENT** –1st __PR____ 2nd __GV____ MOTION CARRIED. APPROVED.

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

Beate Bjoerklund, SB; Dominic Keen, LM; Gillian Speicher SM; Joanne Britton SM; Sharon Coronado, SLO; Karen Christiansen, PR; Justin Formanek, SP; Brent Field (GO); Glynis Fitzgerald, BG; Teresa Van Doren (BG); BG Council; [File]



MEETING DATE:	5/12/21	ESTIMATED TIME FOR ITEM:	30-45min
TITLE OF ITEM:	PressReader Demo	PRIORITY LEVEL: (1-Low 3 – High)	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
SUBMITTED BY:	Glynis Fitzgerald		
TYPE OF ITEM:	<input type="checkbox"/> For Discussion <input type="checkbox"/> For Decision/Request Motion <input checked="" type="checkbox"/> Other: <u>Product Demo</u>		

BACKGROUND STATEMENT

BACKGROUND: <i>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>	A representative from Baker & Taylor will be presenting a demo of PressReader as an alternative option for digital news and magazines.
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OUTCOME(S)

DESIRED OUTCOME(S): <i>Describe your desired outcome(s)</i>	This is an exploratory demo only to gauge the interest of the libraries.
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OTHER COMMENTS:	
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MEETING DATE:	05/12/2021	ESTIMATED TIME FOR ITEM:	45 min
TITLE OF ITEM:	Overdrive Collection Guidelines FY22	PRIORITY LEVEL: (1-Low 3 – High)	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3
SUBMITTED BY:	SBPL		
TYPE OF ITEM:	<input checked="" type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Decision/Request Motion <input type="checkbox"/> 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.

The guidelines present the purchasing rotation and amounts for FY22. In addition it has been expanded to be as detailed as possible in order to create a better workflow and patron experience. San Luis Obispo, Santa Maria and Santa Barbara have all contributed to this draft.

Helpful information:

The current ratio of checkouts for FY21 is 65% Adult Fiction, 17% Adult Non-fiction and 16% Youth Services. 53% of Adult Non-fiction was in audio. Turnover rate will be available for the meeting.

About 50% of our checkouts are done through Libby.

We are proposing purchasing for the Spanish collection four times a year, do you have a Spanish-speaking librarian with a desire to be a selector for this collection?

Lucky Day and Curated collections

Lucky Day = Skip the wait list! These top titles are available on a first-come, first-served basis with no holds and can be checked out for 7 days.

Curated collections are the displays viewable on the main page as well as the special collection pages (Kids, Romance, etc). These collections are not updated often currently, and most have been there for several months. At Santa Barbara we see patron checkouts increases on titles promoted this way.

Consider the work load you're willing to commit to as well as the patron experience.

OUTCOME(S)

DESIRED OUTCOME(S):

Describe your desired outcome(s)

Approved guidelines for FY22
Assigned Spanish selectors for the year

OTHER COMMENTS:

Black Gold Cooperative Library System

Digital Collection Guidelines – 2021-2022

DRAFT

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 eBook and audiobooks 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 circulation shows that Fiction titles are checked out at a 4:1 ratio over Non-Fiction titles for both audiobooks and eBooks. Non-Fiction should be purchased only when the title is of wide interest (biographies, bestselling authors with lasting value, popular demand, etc.).

Formats

For audiobooks, 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, 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, prefer 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

The monthly amounts for each category beginning July 1, 2021 are:

- Audiobooks pre-orders for upcoming month - **\$4000 (suggested)**
- eBooks pre-orders for upcoming month - **\$3400 (suggested)**
- Spanish - (combination of adult and youth) **\$1200 annually (suggested)**
- Youth Services (including teen items) - (combination audiobooks and eBooks) **\$2000 (suggested)**
- Replacements/Backlist **\$2,500 (suggested)**
- Duplicates - (purchased by Black Gold) **\$7,500 (suggested)**

Purchasing Schedule

Purchasing schedule is proportional to size of jurisdiction as represented by percentage of overall Black Gold budget contributions.

Adult

Audiobooks, Ebooks and Replacements

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

Youth Services

eBooks and Audiobooks

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

Spanish

Purchased 4 times a year - put out a call for selectors.

The order should be placed no later than the 7th of every month. If a library is not able to meet this deadline, please inform Glynis, who will contact Santa Barbara or San Luis Obispo to complete the purchases by the 15th.

Monthly Purchasing Considerations

In order to ensure consistent collection development, please follow these guidelines for purchasing content access:

1. Review suggestion carts from fellow purchasers.
2. Pre-order new releases for the next month (Overdrive will have a banner for this) ie, if you order in December, you should be purchasing titles that come out in January at the earliest - ok to look further into the future for big name authors)
3. Check and see if titles are available on hoopla before purchasing on Overdrive, especially for audiobooks
4. Review patron recommendations (evaluate value and continued interest, especially for non-fiction titles)
5. Check against bestseller lists whether any relevant titles were missed last month.
6. 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.

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 audiobooks 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 10:1 per copy
 - Get up to 4 extra copies before looking into providing SU content
 - Be cognizant of best cost/value ratio when purchasing.
 - 1 of the copies may be utilized for Lucky Day
- Review collection for duplicates by the 15th and the 30th of each month

Guidelines for Metered/Expiring Content

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

- The purchaser will review the Expired with holds carts and purchase copies as needed to satisfy holds when there are three or more holds on a title.
- The purchasers will review the rest of the content of the Expired with holds carts for longevity titles, such as classics and parts of series, that we would like to keep regardless.
- Titles that have expired and are not repurchased will be weeded from the OverDrive collection and the MARC record will be removed from the BG Catalog approximately every month. 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 unweeded titles need to be purchased the same day or they will revert back to weeded overnight.

Selectors and Marketplace Training

Each jurisdiction should assign a Librarian to make purchasing decisions. 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.

General Policies

MARC records are added to the catalog for OverDrive eBooks. In December of 2011, the Administrative Council created a policy that MARC records will not be added when an individual jurisdiction buys eBooks for their own patrons. Only eBooks which can be used by all BG patrons will have MARC records in the catalog.

Lucky Day

BlackGold: Criteria for including titles on Lucky Day include: More than 5:1 hold ratio, with holds from majority or all jurisdictions.

Curated collections

The Collections displayed on the web page should be curated monthly as part of the purchasing rotation.