Consortium Best Practices
Tips for member libraries to maximize participation and circulation

Being part of a shared collection has many benefits. The following suggestions will help your consortium work well together and communicate more regularly. Please review and discuss as a group, and if you have any questions or need assistance with any of these items, contact your OverDrive team. ***We are here and happy to help!***

Administrative

☐ Create an OverDrive Marketplace account for at least one staff member at each member library. Recommended minimum user permissions:

- **End-user support** – allows member library to submit support requests to OverDrive
- **Reports** – allows member library to generate real-time usage reports anytime
- **Create/view carts** – allows member library to create suggested carts, as well as view carts other selectors create.

☐ Encourage all member libraries' staff to sign up for email communications from OverDrive to ensure that they receive important news and updates.

☐ Subscribe to OverDrive's blog and social media pages for real-time news and updates.

☐ Share MARC records. Options include OverDrive's free MARC Express, OCLC, BDS, and eBibliofile.

Collection Development

☐ Decide how your consortium will manage collection development. Options include:

- **Centralized Committee** – Form a committee made up of 3 to 5 volunteers from member libraries. This committee will create and submit content orders for the group. Rotate committee participation quarterly or annually.
- **Centralized** – Appoint one library who will create and submit content orders. Member libraries can contribute by creating suggested carts.
- **All** – Each library commits an annual budget and submits content orders independently

☐ Set purchasing policies. Discuss the following questions at a meeting or via web conference:

- How much will each library contribute monthly or annually?
- How much will each library contribute towards holds?
- How often will you submit new content orders?
- What holds ratio do you want to uphold?
- What is your maximum acceptable average wait time?
- Will you allow users to make title recommendations? If so, what is your plan for reviewing submissions and determining which to purchase?
- What formats do you want to offer in your collection?
- Will you utilize OverDrive's automated purchasing tools like Holds Manager and Recommend to Library Manager?
- Are there any genres of content types that you want to exclude?
- Will you need separate billing accounts?
- How will you handle content credit?

Collection Development (cont'd)

- ☐ Curate new collections regularly. Determine the following:
  - Who will curate collections? Once assigned, update Marketplace user permissions to include 'Curate.'
  - How often will you update and create new collections?
- ☐ Establish a process for managing Metered Access titles.
  - How will you track the remaining time or licenses?
  - What factors will you consider when determining if you should re-purchase?
  - Will you include Metered Access titles in your automated plans, such as Holds Manager?
- ☐ Set a weeding policy.
  - Who is responsible for the regular weeding?
  - How often will you weed?
  - What criteria will you use to determine what needs weeded (publication date, Metered Access expiration status, subject material, etc.)?
- ☐ Agree on your group's level of participation in OverDrive Advantage.
  - Is Advantage opt-in or required?
  - How does Advantage collection development impact how holds are filled?
  - Will you use Advantage Plus features?

Connect with Member Libraries

- ☐ Set up an email listserv to communicate updates, ask questions, share best practices, and more.
- ☐ Schedule regular meetings to gather in person or via web conference. Invite your OverDrive team to attend to share updates, provide data, and answer questions.
- ☐ Find an opportunity to meet at your state library conference.
- ☐ Share contact information of the committee with OverDrive, and all member libraries so it's easy to ask questions and share suggestions.

Set up for Success

- ☐ Identify the goals for your consortium collection and define how you will measure success.
- ☐ Track and discuss goal progress during each meeting.
- ☐ Participate in regular staff training:
  - View on-demand training anytime, anywhere at the OverDrive Resource Center.
  - Join OverDrive's open monthly webcasts.
  - Schedule refresher training annually for all member libraries. Contact your OverDrive Account Manager to discuss dates and times.
- ☐ Create a marketing plan and commit to a shared budget for ordering printed materials.
- ☐ Encourage marketing online, in the library, and around the community. Visit the OverDrive Resource Center for print-ready materials, digital graphics, templates, and more.
- ☐ Review and share OverDrive's Best Practices guide.

Questions? Contact your Account Manager.

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