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!*

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**Administrative**

- [ ] Create an [OverDrive Marketplace](https://www.overdrive.com) 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.