

Managing Holds without Spending a Fortune

Presented by your
OverDrive staff librarians



Meet your presenters



EMMA
Content Specialist



JANE
Content Specialist

Meet your presenters



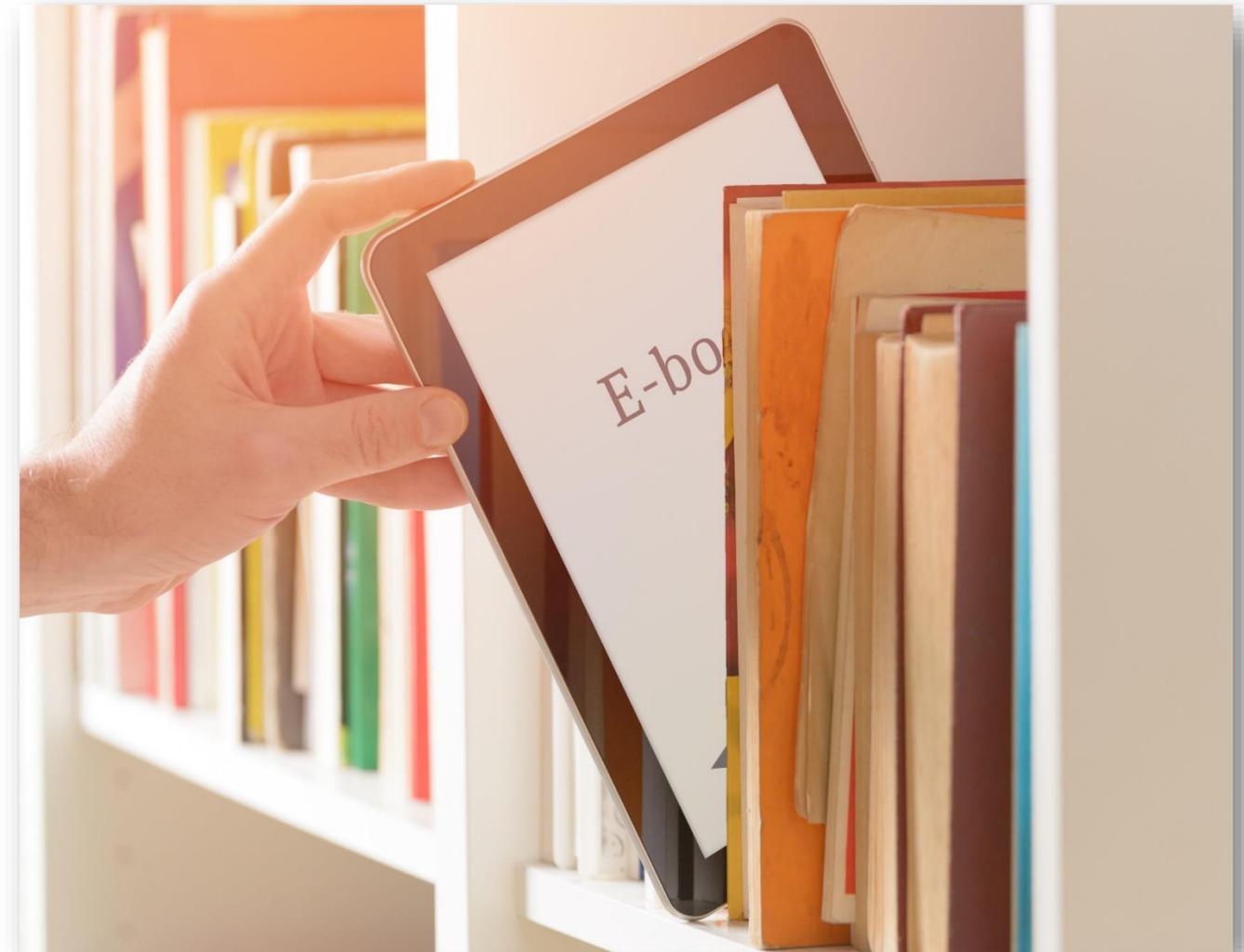
MARIA
Content Specialist



KRISTIN
Content Specialist

Agenda

- Collection development policies & preferences
- Expired Metered Access content
 - ✓ Holds
 - ✓ Weeding
- Holds Manager plans
- Curating digital collections
- Reading rooms & Libby Catalog Guides
- Coming in 2019!



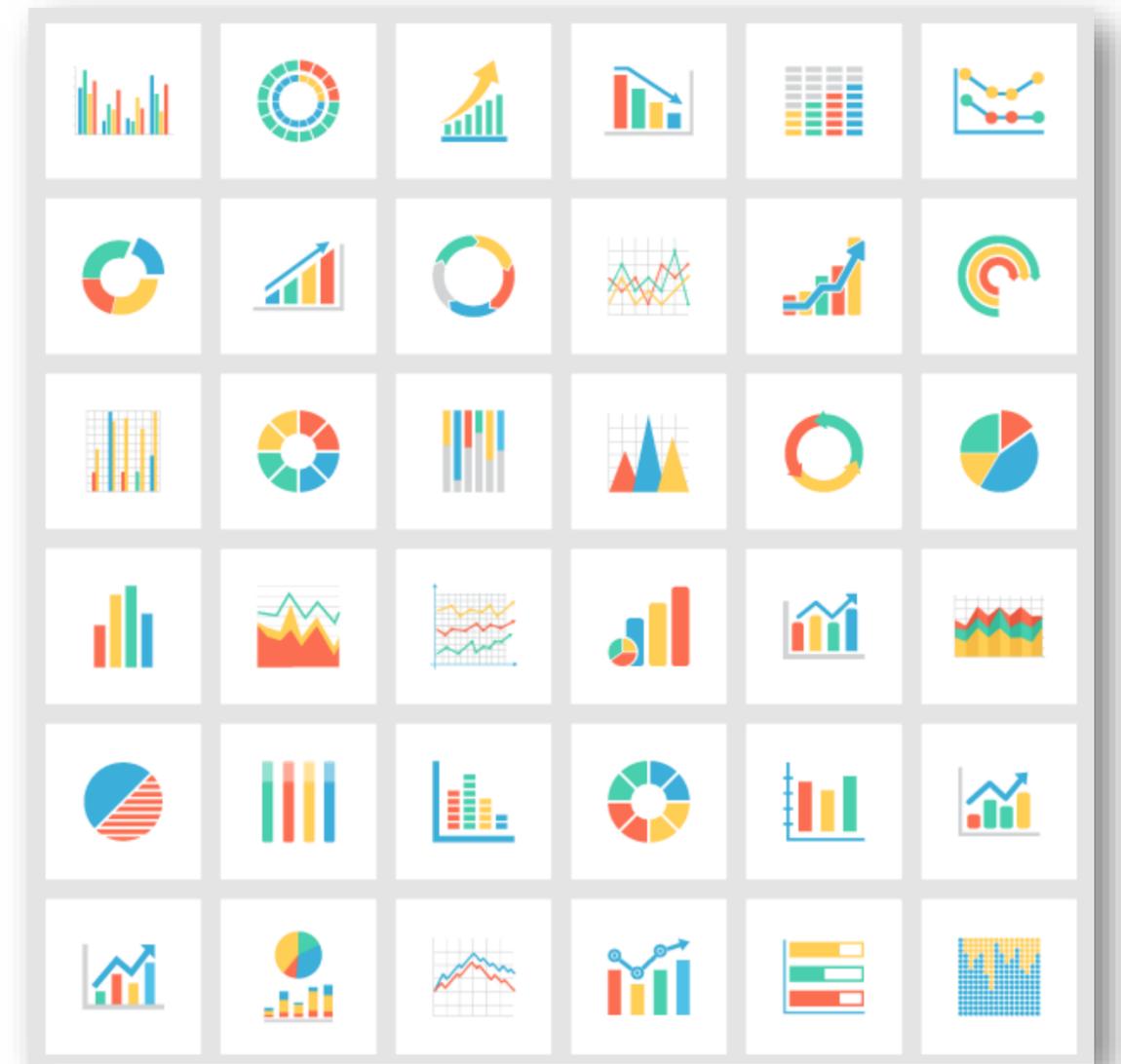
By the numbers

Between 2017 and 2018, on average:

- Library-wide holds grew 22% while holds per user stayed consistent at 1.3.
- The ratio of checkouts to holds also remained consistent 2.4 holds to 1 checkout.
- Libraries saw a 22% increase in active users.

In 2018:

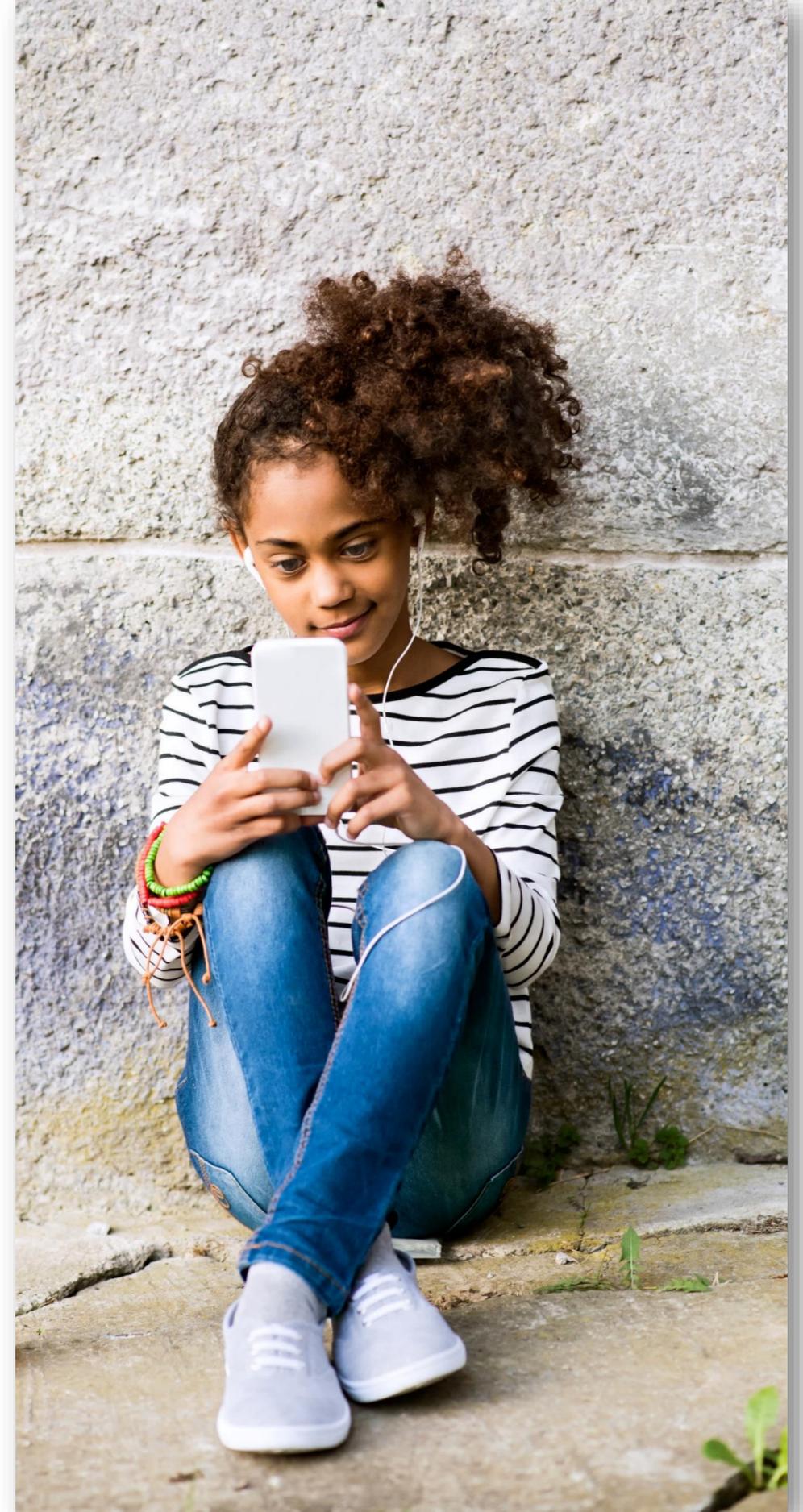
- Of OverDrive top-circulating libraries, three cut budgets and still grew circulation by more than 500,000 checkouts.
- The top 10 library systems using OverDrive had more than 100,000 unique users, in some cases accounting for 15-20% of their population or 50% of their card holders.



Interested in reading more?
[Check out this informative blog series!](#)

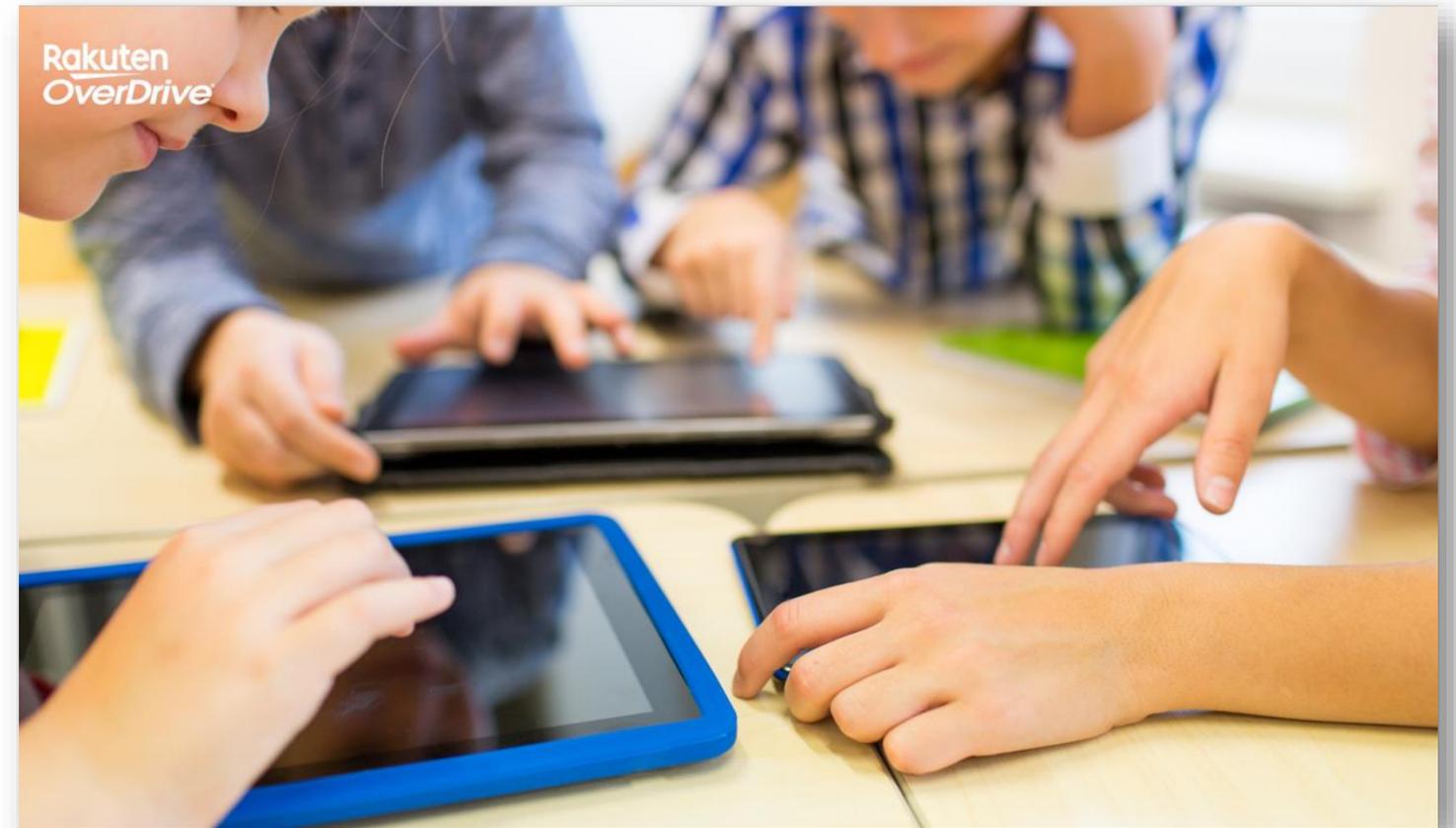
Best practices to consider: Policies & preferences

- **Hold limits:** Review the maximum number of holds your patrons may place.
- **Checkout limits:** Review the maximum number of items your patrons can check out at a time.
- **Recommend to Library limits:** Review the maximum number of recommendations your patrons can make, and adjust the number of recommendations or the time period in which they can make them!



Best practices to consider: Collection development

- **Preorders:** Review how your library is purchasing preorder content - six months in advance? One month? No preorders?
- **Fill holds based on price:** Sort holds list by price and prioritize purchasing less expensive titles.
- **Purchasing frequency:** Buying more often will help fill holds as they are placed.
- **Modify holds plan:** Consider adapting a variable price-based holds ratio chart. Use this to evaluate buying extra copies to meet demands.



Example: Variable price-based holds ratio chart

Price Range	Target Ratio
Under \$25	4:1
\$25-\$50	5:1
\$50-\$75	6:1
\$75-\$100	7:1
Over \$100	8:1

Robust reporting

“Sort your **Current Waiting List report** by **ratio highest to lowest** and scroll through looking for **high holds no longer for sale**, then search to see if a new edition is already in your collection or available to buy.

Don't forget to weed the dead copy; your patrons don't know that you can't get more copies of it and holds will inevitably build again.”



Kady Ferris

Multnomah County Library (OR)

Know when to shop: OverDrive Sales & Promotions

January: New Year, New You

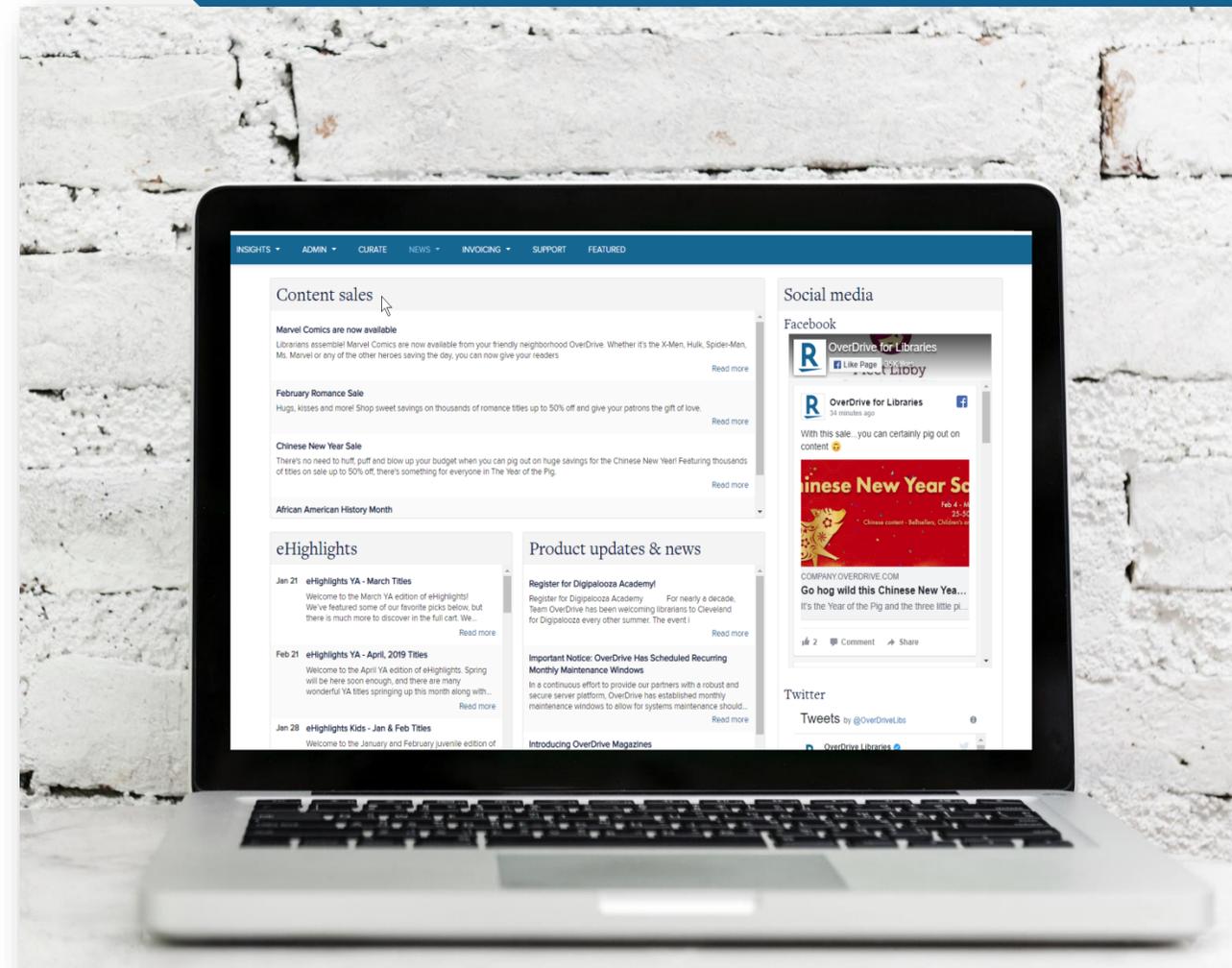
February: Romance

May: YAY for YA

June: Audiobook Month

August & September: Back to School

December: Holiday



Visit the Marketplace [News Tab](#) or the [Resource Center](#) for sale information.

Collection Development

Our Librarians create recommended lists and catalogs with the best hand-picked titles, and highlight the latest sales and promotions!

..... [Recommended Lists](#) [Our Librarians](#)

[Sales & Promotions](#)

Shopping the sales

“We were able to **stretch our budget** for audio titles by utilizing Overdrive’s **June Audiobook Sale** last year, and I have been astounded by the success of our audio collection since. I assumed our circulation would slow down at some point, but it has been **increasing over 40%**, year after year.”



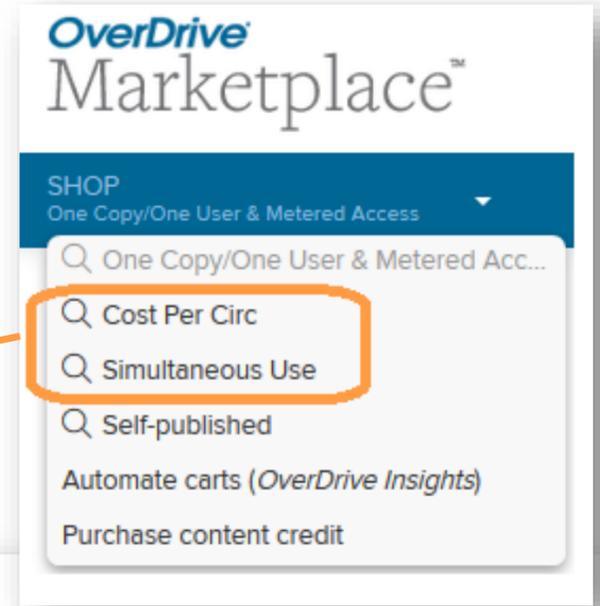
Kathy Bigley

Mid-Continent Public Library (MO)

Identify the most efficient method to fill holds

Compare titles with holds against:

- Simultaneous Use plans
- Cost-per-circ titles
- On-sale titles



Cost Per Circ (CPC)

When you add Cost Per Circ (CPC) titles, you only pay for the titles that your users borrow. CPC titles can be borrowed simultaneously by an unlimited number of users until your monthly budget runs out or individual users reach their monthly CPC title limit. Once either limit is reached, users can place holds on the titles and borrow them the next month (when the budget and per-user limits reset) or sooner, if you manually increase the budget or per-user limit.

You can revoke CPC titles or edit your monthly CPC budget and per-user checkout limit at any time. Your changes will go into effect within 24 hours.

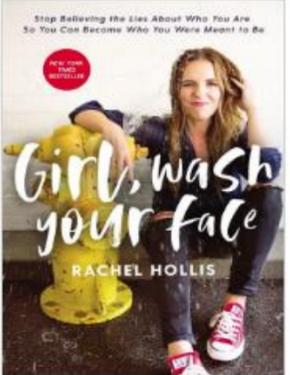
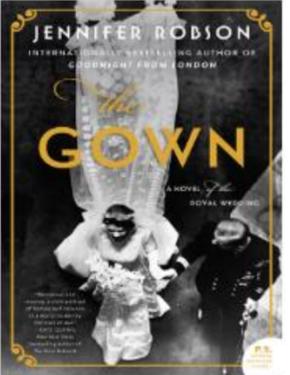
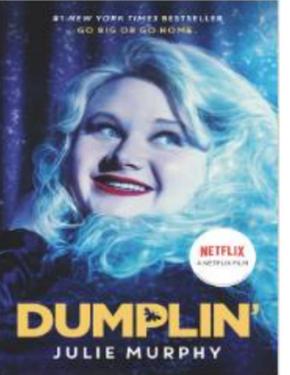
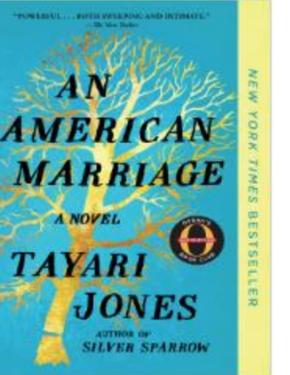
To remove a single CPC title from your site, search for the title and select **Revoke**. To remove all CPC titles, select **Revoke all CPC titles** in the left navigation menu.

To control how much your library spends per month on CPC titles, select **CPC monthly budget** in the left navigation menu.

If you have **Library site admin** permission, you can also control how many CPC titles a user can borrow* per format in a month. To view or edit these limits, visit the **Library site admin** page (under the **Admin** tab).

*Any CPC titles that a user borrows also count towards their normal checkout limit for digital titles.

Ebook Bestsellers < >

 ADD CPC TITLE	 ADD CPC TITLE	 ADD CPC TITLE	 ADD CPC TITLE	 ADD CPC TITLE	 ADD CPC TITLE
Bird Box A Novel Josh Malerman \$1.99 Ebook	Girl, Wash Your Face Stop Believing the Lies About Who You Are So You Can Become Who You Were Meant to Be Rachel Hollis \$1.99 Ebook	The Gown A Novel of the Royal Wedding Jennifer Robson \$1.99 Ebook	Dumplin' Dumplin' Julie Murphy \$1.19 Ebook	Moon of the Crusted Snow A Novel Waubgeshig Rice \$1.09 Ebook	An American Marriage A Novel Tayari Jones \$2.69 Ebook

Multiple Access models

“When looking at buying another copy of an ebook or audiobook to fill holds, I have started to [check if it is available in CPC](#).

Can I clear the holds list for \$20 instead of buying another copy at \$60?”

Timberland Regional  **Kim Storbeck**
LIBRARY *Timberland Regional Library (WA)*

Expired Metered Access content

- Identify expired titles and/or titles with holds no longer available for sale.
- Decide whether to repurchase (usually based on a minimum # of checkouts and/or holds).
- Cancel holds and weed the titles if not repurchasing.

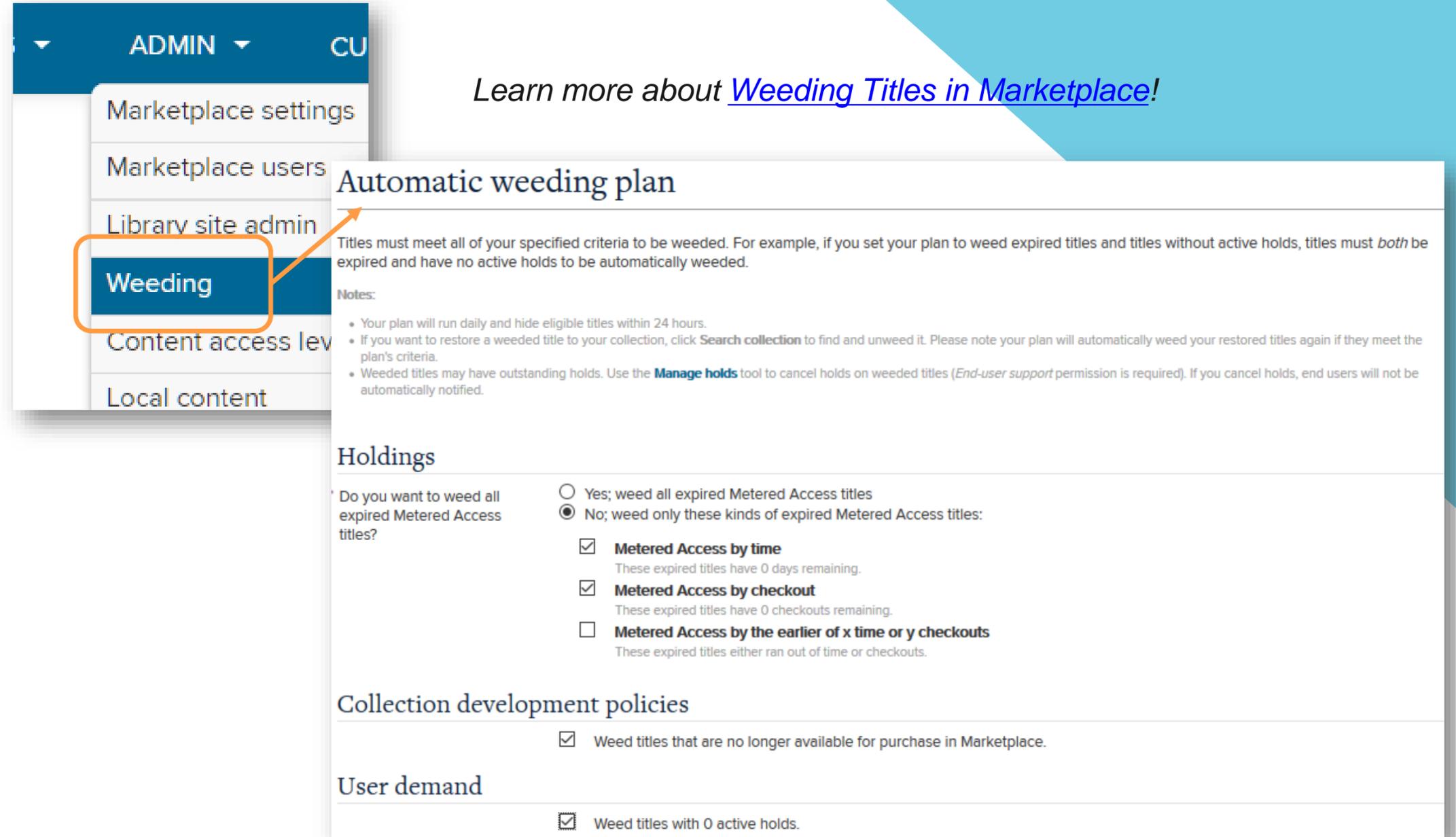


Automatic weeding plan

Create a plan to weed expired metered access titles.

Set additional criteria:

- Titles no longer available for purchase
- Titles with 0 active holds



Learn more about [Weeding Titles in Marketplace!](#)

Automatic weeding plan

Titles must meet all of your specified criteria to be weeded. For example, if you set your plan to weed expired titles and titles without active holds, titles must *both* be expired and have no active holds to be automatically weeded.

Notes:

- Your plan will run daily and hide eligible titles within 24 hours.
- If you want to restore a weeded title to your collection, click **Search collection** to find and unweed it. Please note your plan will automatically weed your restored titles again if they meet the plan's criteria.
- Weeded titles may have outstanding holds. Use the **Manage holds** tool to cancel holds on weeded titles (*End-user support permission is required*). If you cancel holds, end users will not be automatically notified.

Holdings

Do you want to weed all expired Metered Access titles?

Yes; weed all expired Metered Access titles

No; weed only these kinds of expired Metered Access titles:

- Metered Access by time**
These expired titles have 0 days remaining.
- Metered Access by checkout**
These expired titles have 0 checkouts remaining.
- Metered Access by the earlier of x time or y checkouts**
These expired titles either ran out of time or checkouts.

Collection development policies

- Weed titles that are no longer available for purchase in Marketplace.

User demand

- Weed titles with 0 active holds.

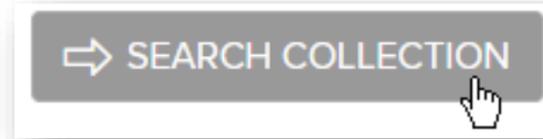
Search for unavailable titles with holds

1. Use “Search Collection” in the Weeding tool to find “Not Available for Sale” and “On Hold” content.

2. Export applicable titles to a spreadsheet with “Create Worksheet.”

3. Search by title to look for new versions.

Contact your Account Manager or Content Specialist for additional information or assistance.

A vertical filter panel with a white background and a grey border. It contains several filter categories, each with a dropdown menu. The categories and their selected values are: Availability: Not available for sale; Subject: All subjects; Language: All languages; Publishers: All publishers; Format: All formats; Lending model: All lending models; Holdings: All; On hold: A checked checkbox.

Availability:	Not available for sale
Subject:	All subjects
Language:	All languages
Publishers:	All publishers
Format:	All formats
Lending model:	All lending models
Holdings:	All
On hold:	<input checked="" type="checkbox"/>



Holds Manager plans

The image shows two screenshots of the OverDrive Marketplace interface. The top screenshot shows the main navigation menu with 'Automate carts (OverDrive Insights)' highlighted in a blue box. An orange arrow points from this box to the 'Insights - Automate Carts' section in the bottom screenshot. The bottom screenshot shows the 'Insights - Automate Carts' page with a 'Holds Manager' section. The 'Holds Manager' section includes a clock icon and text: 'At your website, demand builds as your users place titles on hold. Holds Manager lets you respond to user demand quickly and easily by automating orders based on holds. Every time a Holds Manager plan runs, you can have it create a cart for your review. Or, Holds Manager can automatically place a holds-driven order on your behalf. You can edit these plans at any time.'

Now with support for unlimited, multiple plans per format!

Learn more about [Managing Holds in Marketplace!](#)

Hold Manager plans, cont.

Set a maximum number of copies per title.

* Do you want to limit the copies purchased for a given title?

Yes; I don't want to own more than copies of any title.

No; include as many copies as needed to satisfy this plan.

Utilize the “Run Now” option.

Hold Manager

At your website, demand builds as your users place titles on hold. Hold Manager lets you respond to user demand quickly and easily by automating orders based on holds. Every time a Hold Manager plan runs, you can have it create a cart for your review. Or, Hold Manager can automatically place a holds-driven order on your behalf. You can edit these plans at any time.

+ CREATE NEW **⇒ RUN NOW** ✎ EDIT 📄 CREATE WORKSHEET ✖ DELETE

#	<input type="checkbox"/>	Format(s)	Internal purchase order ID	Frequency	Budget remaining	Last run date	Next run date	Last edited by
1.	<input checked="" type="checkbox"/>	📖		Daily	\$100.00	2/22/2019	2/23/2019	Heather Valentine-Gold
2.	<input type="checkbox"/>	🎧		Once a month	\$1,000.00	1/28/2019	2/28/2019	Heather Valentine-Gold
3.	<input type="checkbox"/>	📺		Once a week	\$500.00	2/20/2019	2/27/2019	Liz Isbell
4.	<input type="checkbox"/>	🎧 📖		Once a week	\$100.00	2/20/2019	2/27/2019	Heather Valentine-Gold
5.	<input type="checkbox"/>	🎧 📖		Once a month	n/a	2/3/2019	3/3/2019	Heather Valentine-Gold
6.	<input type="checkbox"/>	🎧 📖		Twice a month	n/a	2/20/2019	3/5/2019	Courtney Sveda

+ CREATE NEW ⇒ RUN NOW ✎ EDIT 📄 CREATE WORKSHEET ✖ DELETE

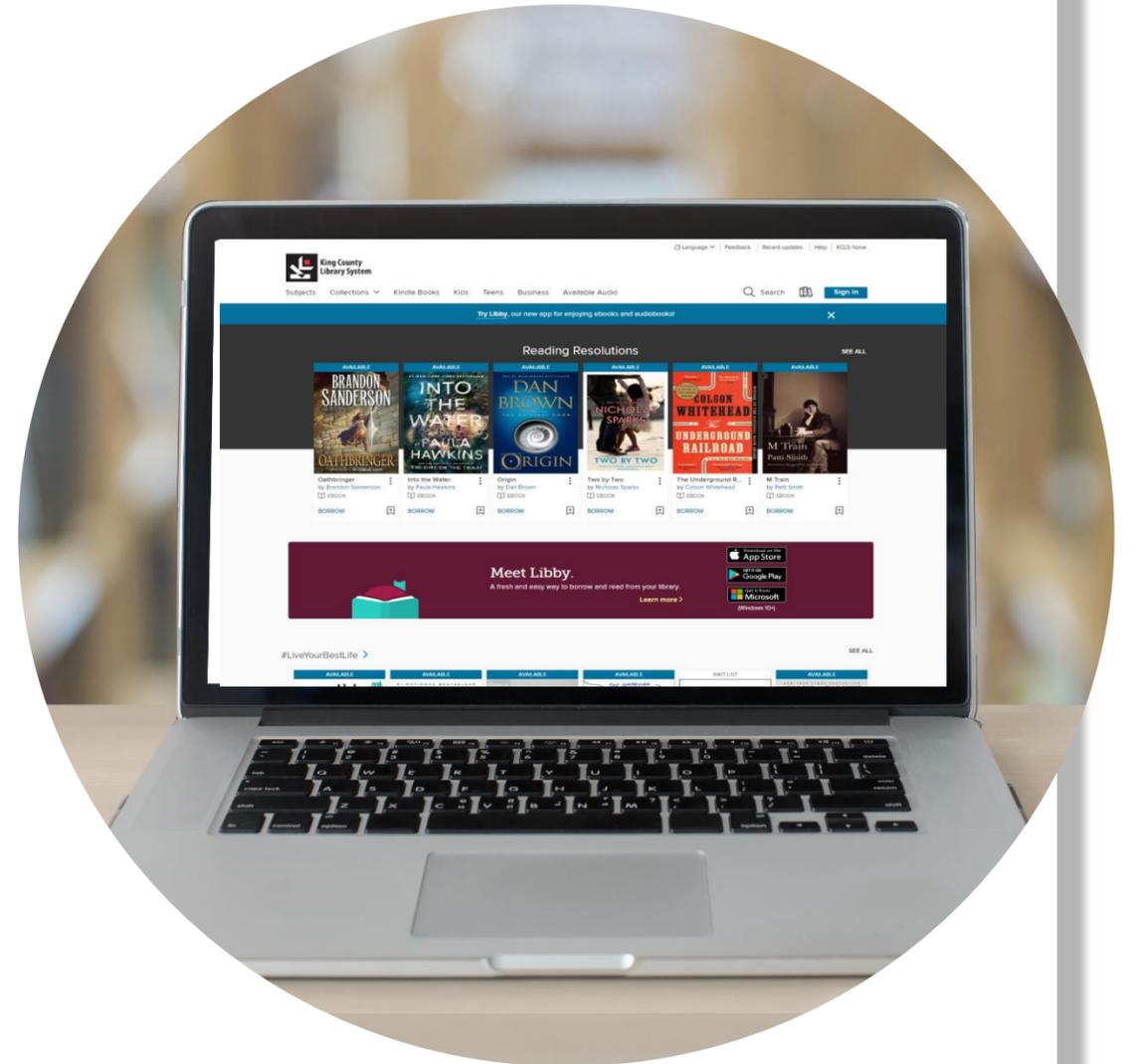
Does your Holds Manager plan still work for you?

- Check your current plans.
- Adjust existing plans or create new ones as your library's needs change and grow.
- Review your Holds Manager carts as soon as they're created (i.e., if you have a weekly cart created on Fridays, check that day) so items aren't out of date.
- Talk to your OverDrive team about customizing the tools available for your library.



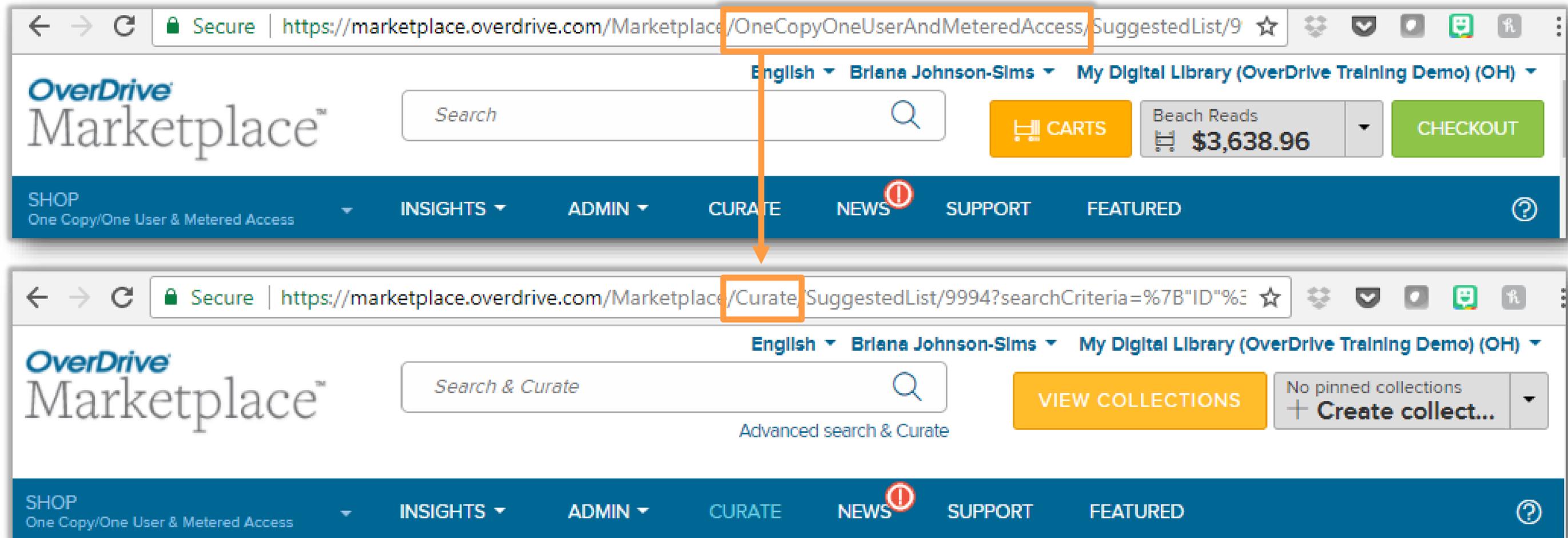
Drive circulation with curated collections

- Feature mid- and back-list titles. You've built a deep catalog so show it off!
- Curate “Available Now” content.
- Set homepage curated lists to “Show all titles, but show available first”.
- Highlight Simultaneous Use plans with collections.
- Highlight one previously popular title with several available copies that aren't checked out.
- No time to curate? *Ask us for help!*



Curation “hack”

1. Open a Recommended List in Marketplace.
2. Edit the URL by replacing ‘OneCopyOneUserandMeteredAccess’ with ‘Curate’:



3. Add the titles to a new or existing collection!

Curating success

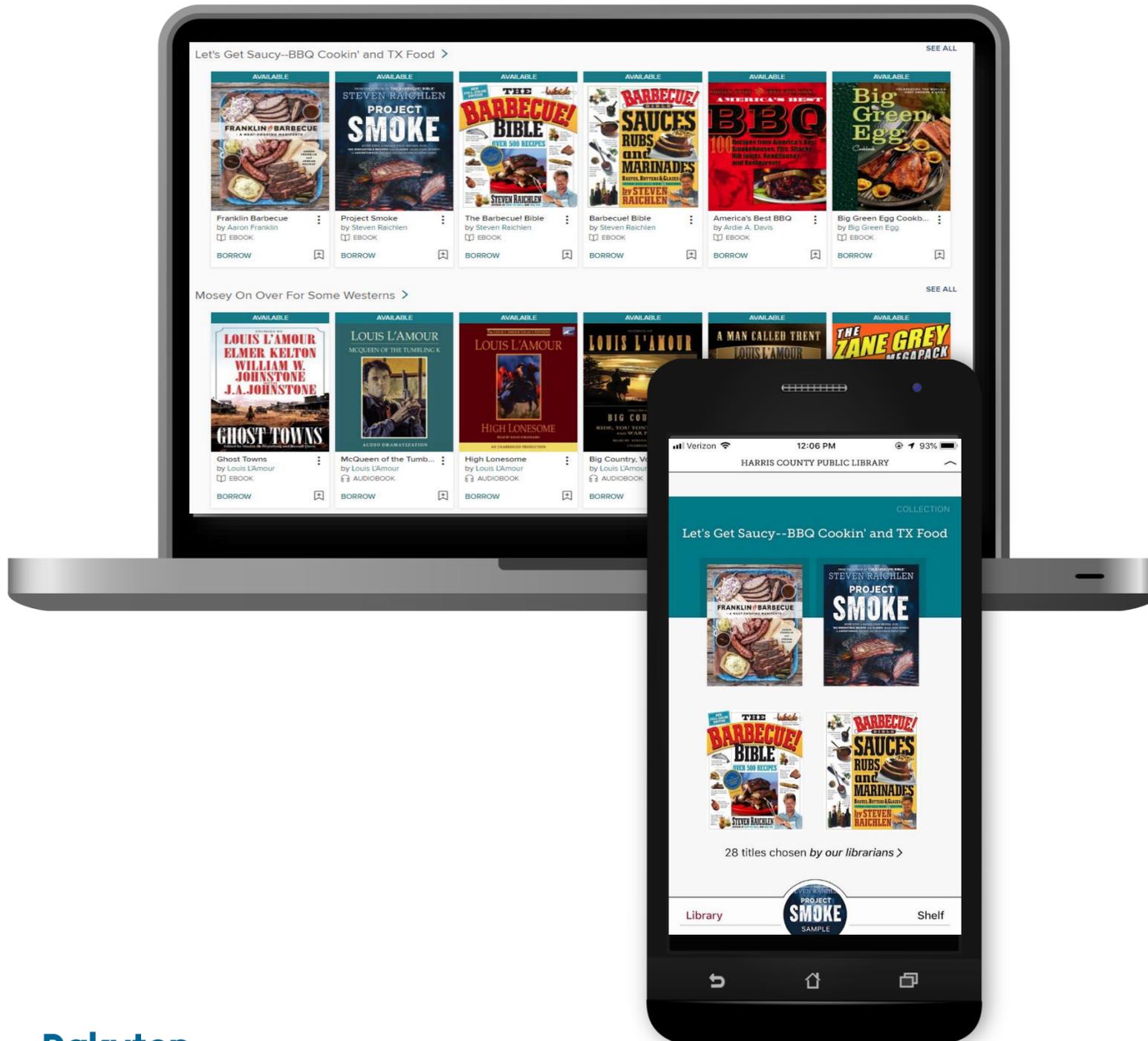
“We’re using an automated collection for popular fiction called ‘I Spy...Fabulous Fiction!’ to highlight fiction items that are available. Set your collection to ‘Show available titles only’ and sort by ‘Low circulating’ and you have a collection of titles with no holds queue that constantly refreshes itself with no work on your part. My collection is filled with fiction titles that were once high-demand, so I have lots of copies. Putting that collection on my front page allows me to continue to get value from my initial purchase and gives folks waiting for popular items (OMG BECOMING!) something they can check out and enjoy right away.”



Jessica Russell

Harris County Public Library (TX)

Upcoming curation webcast!



Curating Collections for Your Digital Library

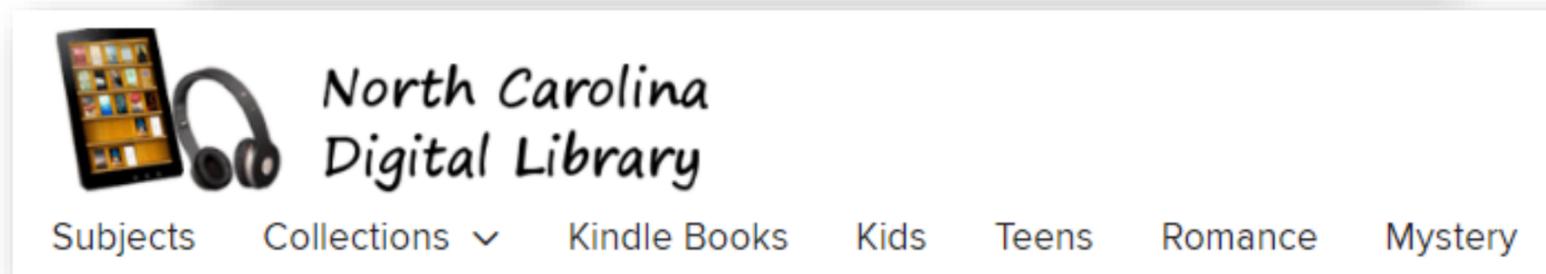
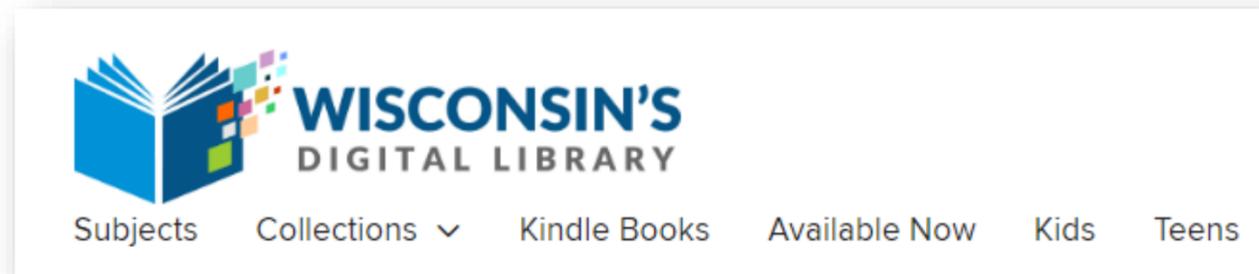
Wednesday April 17, 2019

2:00PM EDT

Join us for 30-minute session on how to drive user engagement and increase circulation with curated collections for your digital library. Courtney will cover how to create and publish automated and curated collections, curate from past purchase orders and recommended lists, and find inspiration for curation all around you.

Create eReading Rooms or Libby Catalog Guides

- Create rooms or guides to focus on content users can access immediately.
- The process is quick and available at no cost.
- Options include: “Available Now” or specific content by subject, such as Romance, World Languages, and Adult Education.
- Market rooms/guides directly to users via social media and/or the library website.



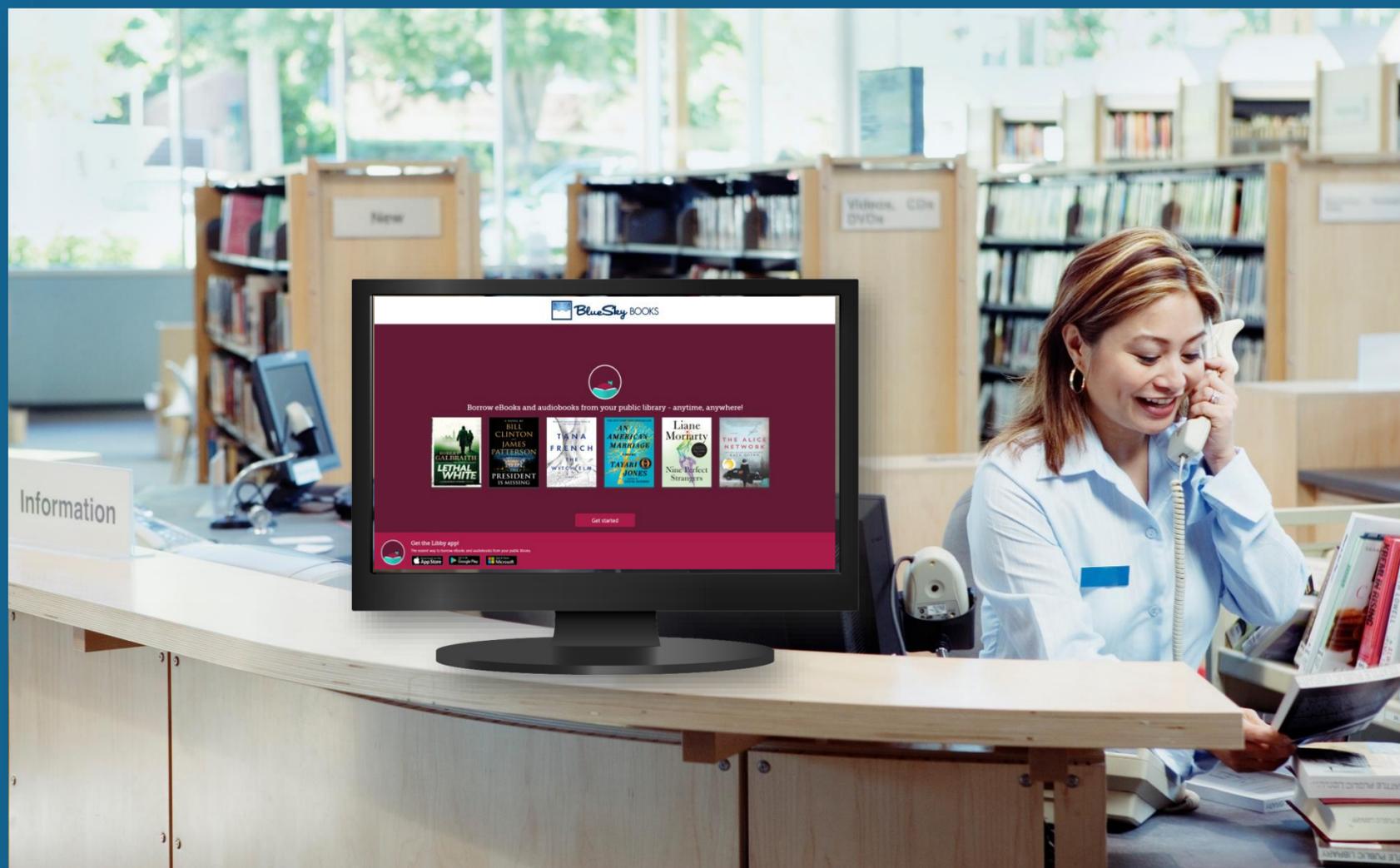
New & coming soon to OverDrive

- **New!** Gentle reminders: Libby encourages users to return books early to increase turnover.



- **Coming soon!** “Lucky Day” shelves will make select copies of high-demand titles available with no holds.





Coming soon!

OverDrive Digital Showcase

- Updated version of OverDrive Media Station.
- Discovery software to search, sample, and access titles in an OverDrive collection.
- Will be available to all partners **at no cost.**

A white ceramic mug with a simple line drawing of a cat's face is on the left. To its right is a white plate with two donuts. In the foreground, a grey Kobo e-reader is open, showing text on its screen. The background is a light-colored wooden surface.

The best OverDrive tool?

Your OverDrive team!

Please contact us; we're always here to help.

Contact us!



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GA, AL, FL, MS, AR

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Don't have the time right now?

Click the link below when you get the presentation PDF and fill it out later.

[OverDrive Training Evaluation](#)

THANK YOU

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