

# UP NORTH DIGITAL CONSORTIUM MEMBER AGREEMENT

*The Up North Digital Consortium is a group of public libraries that have invested in and continue to develop a digital collection through OverDrive with the mission of using combined resources to provide a dynamic collection that meets the needs of library patrons served by consortium members.*

## **Definitions:**

- “member” is used to show membership in a cooperative
- “affiliate” is used to show affiliation or membership with the Up North Digital Consortium
- “representative” is used to state a role on the Up North Digital Steering Committee.

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## AFFILIATION

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To join the Up North Digital Consortium, a library must be a member of either the Northland Library Cooperative, or the Mid-Michigan Library League. The cooperative director shall approve affiliation with the Consortium. An affiliate is one legal entity (library, as defined by the State, not outlet), billed separately by OverDrive. Each affiliate library has one vote in the Consortium. The director of the library is assigned the affiliate voting rights, unless otherwise designated. Voting is done via email, with a one-week voting window. If a vote is not cast within that period, it is considered not eligible to be counted. Decisions will be made by a simple majority of the number of libraries that cast a vote, unless otherwise stated in this document.

In order to join the Up North Digital Library Consortium, after approval by the appropriate cooperative director, the library signs a participation agreement with the vendor, OverDrive, and signs this consortium membership agreement. The signed agreements will be housed at the affiliate library’s cooperative.

The Consortium aims to improve the OverDrive experience for their patrons. Affiliate libraries must have the ability to upgrade their local integrated library system as needed to allow software and system updates to be implemented. Libraries must also have the ability to authenticate their users, to prohibit non-eligible users from accessing the system, including patrons not in good standing, patrons who have moved, and patrons whose card has expired. Affiliates are responsible for the authentication of their patrons.

If a local system is not able to keep up with system wide upgrades including patron authentication, affiliation in Up North Digital Library Consortium may be revoked by a 2/3rds vote of the total affiliates.

Libraries may withdraw from the Up North Digital Library Consortium. Items purchased with the Advantage account may be removed and taken with the withdrawing library. All items purchased with basic content credit would remain with the Consortium. No refunds will be provided to a library leaving the Consortium.

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## STEERING COMMITTEE

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The appointed Steering Committee makes recommendations for policies, procedures, and protocols to all affiliates of the Up North Digital Consortium. Policies and procedures are adopted by a majority of affiliate libraries voting on the recommendations.

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The Steering Committee is made up of at least two but not more than four representatives from each cooperative, with an equal number represented from each. Participation is on a volunteer basis. A Consortium affiliate interested in a seat should notify the cooperative director. Each cooperative director is included as a non-voting, ex-officio member of the Up North Digital Library Steering Committee.

## ACCOUNTS / CREDITS / FEES

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OverDrive shall invoice for the calendar year in January, unless otherwise arranged. Invoices are located in the Marketplace. This annual bill includes a maintenance fee from the vendor, a required content fee, and a holds fee. **The holds fee is assessed at 25% of the basic content credit and shall automatically go into the holds management account.** Titles purchased with the basic content credit shall go into the shared Consortium collection.

**The basic content credits paid annually to OverDrive must be spent by December 1. Any funds remaining after that date shall be credited to the holds management account.**

The holds management account shall be set up with funds allocated from the designated percentage of the basic content credit and unspent, year-end content credit. These funds shall be used to purchase titles no longer available that have attached holds, titles with high numbers of holds, and titles that are requested by patrons. The goal is to keep all titles at a 7:1 holds ratio or better. The Steering Committee shall recruit a small task force of Up North Digital Library selectors as Holds Managers, to manage the holds management account. The total number of copies purchased shall be limited to ten per format.

In addition to the required content purchased for the shared site, any library may opt to set up an Advantage account, which allows them to purchase titles for the benefits of their own patrons. **All members are strongly urged to choose the Advantage Plus option.** The vendor provides a separate account login for ordering Advantage titles. Advantage credit may be purchased through the Marketplace. Materials purchased with an Advantage account shall be held for local use only; **Advantage Plus allows the entire Consortium access to that title, but the Advantage library patrons shall have priority access to these titles and be placed at the top of holds queues.**

The Steering Committee may, in the future, identify added services that would require fees to be charged to all affiliates. These fees would be adopted by a majority vote of all the participating libraries voting on the recommendation.

## CIRCULATION RULES

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Borrowing privileges are limited to the service population of participating libraries. Borrowing privileges are contingent on good standing from the patron's lending library.

### **Borrowing & Hold Limits**

- A limit of five titles may be checked out at any given time.
- A limit of five titles may be reserved at one time
- Loan duration on all items is 14 days, with an option to return early.

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- Items may be renewed if there are no existing holds.
- Users have 3 days to checkout their hold once it becomes available.

The Steering Committee will periodically review these limits.

## COLLECTION DEVELOPMENT GUIDELINES

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The Up North Digital Consortium acknowledges that most public libraries have collection development policies. This policy is not intended to replace those individual local policies but rather is designed to serve the cooperative nature of the collections. The Up North Digital Library collection shall reflect the diversity of its contributing communities.

### Material Selection

Material selection is intended to respond to the recreational reading and lifelong learning needs of our library communities. The shared collection primarily emphasizes:

- Popular materials, including fiction and non-fiction in all formats and for all ages.
- Lifelong Learning – including current and historical non-fiction in a variety of formats for all ages.

**Consortium members who do not wish to make their own selections may contact their cooperative director to discuss other options.**

### General Criteria

Ordering regularly, evenly distributing spending through the year is highly recommended considering:

- Popular interest or demand
- Relation to existing collection and other material on a certain subject
- Published reviews
- Patron requests
- Currency of original publication (not date of digitization)
- Suitability of materials for meeting the needs of the patrons
- Unabridged editions are preferred
- Budget constraints

### Selection Tools

- Standard review sources
- Lists – including bestsellers and award winners and nominees
- Titles in the news, including “books to movie” titles
- Sites to identify titles in series
- OverDrive reports and statistics: Turnover rate charts, Activity charts by subject, View title statistics, Current waiting lists

### Patron Requests

All patron requests will be considered at individual libraries following their guidelines. The Up North Digital Library is under no obligation to fill any request.

### Request for Reconsideration of Material

The Up North Digital Library Consortium supports intellectual freedom and has adopted the following statements as policy: American Library Association’s (ala.org) Freedom to Read Statement and the

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Library Bill of Rights, and the American Film and Video Association's "Freedom to View" statement.

A patron questioning material in the collection shall contact the Library Director of their home library, who shall give the patron a copy of this policy and review it with them. A library patron who still has questions regarding material in the Up North Digital Library may submit a complaint in writing to their library director, following their library procedures. The director will then present it to the Steering Committee for review. The Steering Committee shall notify the purchasing library for input. The Steering Committee shall make the final decision in regards to the title in question within one month of receipt of the reconsideration form. Once a title has been reviewed, no further challenges to this title shall be considered.

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## MARC RECORDS

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The Steering Committee shall recruit a volunteer to manage the MARC records for the Up North Digital Library. The MARC records manager shall review the current process and make a recommendation to the Steering Committee to either continue or alter the process.

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## MARKETPLACE RULES & GUIDELINES

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### SELECTORS

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Once a library has Affiliate status, that library may place a request to OverDrive should additional Marketplace accounts be required. Accounts may be set up using any of the following permission types:

- End-User Support: has the ability to place support tickets with OverDrive to assist patrons
- Selector: End-user support plus the ability to create carts.
- Purchaser: End-user support plus the ability to create and purchase carts.

**Important:** If a staff member with a Marketplace account leaves your library, please contact the OverDrive Liaison to have them removed.

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### ACQUISITIONS PROCEDURES

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- The responsibility for material selection rests with the participating libraries.
- **25% of each affiliate library's content credit shall be transferred to the Consortium account to manage holds, and/or "available any time" collections.**
- Each affiliate library must purchase their required minimum of new content for the shared collection each fiscal year. **Libraries that fail to spend their minimum by December 1<sup>st</sup> of each year forfeit their balance to the holds manager account.**
- Purchases should be spread out over the year to ensure new material is always available. Libraries may receive periodic purchasing reminders. Members are encouraged to spend basic content credit on new titles in order to create a robust database for the users.
- The Steering Committee shall recruit a Holds Manager to purchase additional copies of items to try to meet our 7:1 holds ratio. The number of copies purchased shall be limited to ten per

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format.

- Preferred formats are MP3 for audio and epub for books.
- Preferred versions are unabridged.
- A 1:1 ratio is preferred on the titles purchased in audio and ebook formats. Purchase a given title once in each format. Additional copies of either format may be purchased as needed.
- OverDrive may add carts for consideration based on requests from our group, such as award winners, bestsellers not yet owned, incomplete series, etc. Anyone may order from these carts and are encouraged to review them regularly.

**Weeding:** The Steering Committee shall review the Non-fiction collection once a year for outdated material.

## ORDERING PROCESS

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When viewing an individual item or items in a list, the top (bluish) bar immediately below the cover image shows the number owned by the Consortium, how many are currently circulating, how many outstanding holds exist, the holds-to-owned copies ratio (our goal is 7:1 or better), and the number of copies pending in a cart. The reddish bar shows the same information for the libraries that have Advantage accounts. If the title is a metered access title, you can see how many licenses have been used, and how many remain. Metered access titles may be licensed for 26 or 52 circulations or 12 or 24 months depending on the publishers' terms and must be repurchased for continued access after that point.

The Consortium has chosen to allow both One Copy/One User and Metered Access titles to appear in searches by default. Selectors should be aware of this when choosing titles for their carts. Selectors may select the "Lending Model" delimiter in the search interface and click on the desired model if there is a local preference for licensing.

When any selector begins building a cart in the Content Reserve system the cart needs to be named identifiably so persons with questions about the cart know whom to contact. The preferred method of naming the cart is library initials, your name, and the date (i.e. MCL-BobDixon-20170101). Click on the gray "+Create cart" button or select "Add to a new cart" from any item record to create and name a cart.

If you notice that you have an empty cart in the Marketplace, please delete it. You can see all the carts by clicking on "View Carts" which will bring up a list of all the carts for the entire Consortium. To delete your empty cart simply click the box next to the list ID then click the red "Delete Cart" button at the top of the page. Only delete carts with your name attached to them. **Only designated OverDrive Steering Committee representatives should delete old or unnecessary lists that belong to someone else.**

Automatic carts are also created for titles with holds (called *Titles w/Holds* or *OD: Hold Ratio 7:1*) and also metered access titles that are approaching the end of their license (*OD Metered Alert*). Carts featuring curated content may be available for selectors' use.

Carts that have been locked against editing by other viewers are classified by OverDrive as "Private". However, you should be aware that everyone can see your cart, they simply can't edit it. Please remember to name locked carts according to the above suggestion, so questions may

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be addressed to the correct person and/or library.

**If you build a cart, please submit that order within one month.** If other affiliates of the Consortium see an item is currently pending in another cart, they might choose not to purchase that title. It is important to submit your orders in a timely manner. Making frequent, smaller orders is preferable for OverDrive. If a cart stays on the working list for more than one month it may be deleted by a designated OverDrive Steering Committee representative.

To complete an order, begin by clicking on the green “Checkout” button in the top right-hand corner of the Marketplace or click on the “Purchase” button in the “View Carts” interface and review the contents of your cart. Once you are happy with your selections, click on the green “Purchase Cart” button. If you do not see the purchase tab, that means your username does not have the authority (as deemed by your Director) to purchase items. The next page contains conditions that must be acknowledged to complete the purchase, including metered access terms, final acceptances, and acknowledgements. Please enter any local Purchase Order information in the box. You will only be charged for your order after you click the green “Complete purchase” button at the bottom of this page to finalize your order. OverDrive will not refund purchases, so review your order carefully. Once you click submit you will see a verification page letting you know it has been submitted, and your cart will disappear.

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## REPORTS

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There are various reports that may be run from the “Reports” tab in Content Reserve. Listed below are some of the most commonly used reports. These reports may be run for a single library or for the entire Consortium.

- ✓ Purchase Order History – will list purchase orders made by anyone in the Consortium
- ✓ Circulation Activity – view checkouts by library, lending model, format, and dates
- ✓ New Patron Registrations – view by day, month, and/or branch
- ✓ Search checkouts – search for and view users’ checkouts by barcode, title, or checkout ID. You can also reactivate the download links from here
- ✓ Current Waiting List – will show all the titles that currently have holds. Can be sorted by any of the column headings.
- ✓ Collection Statistics – will show how many items we have in the Consortium by format

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## ALWAYS AVAILABLE/PUBLIC DOMAIN EBOOKS

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The OverDrive website includes Public Domain eBooks as a downloadable option for users. To get to this collection, click on the image that says “Additional eBooks Always Available.” This is a separate collection of eBooks from the main OverDrive Collection, and contains over 15,000 titles. Patrons do NOT need to sign in to download these titles, and checkouts do not count towards the five they are allowed. These titles do not expire, and will remain on a device until it is deleted. They are available in ePub format, and use the Adobe Digital Editions software.

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## COOPERATIVE DIRECTOR CONTACT INFORMATION

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Northland Library Cooperative: Roger Mendel, 231-855-2206, [rmendel@northland.lib.mi.us](mailto:rmendel@northland.lib.mi.us)  
Mid-Michigan Library League: Sheryl Mase, 231-775-3037, [smase@mml.org](mailto:smase@mml.org)

## SUPPORT/TROUBLESHOOTING/TRAINING

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1. Participating libraries are the first line of support for their patrons.
2. If the library staff cannot resolve the issue, they may contact OverDrive support or their cooperative director for additional assistance.
3. OverDrive offers a variety of support options, which may be found by clicking on SUPPORT at the top of the page when logged into Marketplace. There are links to MANAGE HOLDS, RETURN TITLES, and RESET DOWNLOADS. The support page is searchable and is the same information that is available on the patron side.
4. OverDrive also provides a variety of training resources on their website. It is the intent of the Steering Committee to offer additional training opportunities at locations within the Mid-Michigan Library League and the Northland Library Cooperative service areas. The goal is for every staff member to be able to use this service, identify a compatible device, and help patrons understand the process.
5. The two cooperative directors shall have as a goal to coordinate two Consortium-wide training sessions each year – including at least one OverDrive 101 class.
6. The Steering Committee shall recruit a marketing task force to develop appropriate marketing materials and make them available on the Up North Digital website.

OverDrive Representative: Mike Evans, [mevans@OverDrive.com](mailto:mevans@OverDrive.com)  
OverDrive Support: <https://marketplace.OverDrive.com/Support>

*Submitted by the Up North Digital Library Consortium Steering Committee: January 22, 2018*

Approved by:

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Library Name \_\_\_\_\_ Director Name \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

Preferred Contact for OverDrive communications:

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Name \_\_\_\_\_ Email Address \_\_\_\_\_