

# Enhance Your Digital Collection with an Advantage Account

# Your Account Team



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Account Manager



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Product Support Specialist



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Digital Content Librarian



# Agenda

1

Advantage overview

2

Common questions

3

Best practices

4

Q&A



# Check-in poll

How comfortable do you feel with **OverDrive Advantage**?

- Not comfortable
- Somewhat comfortable
- Very comfortable

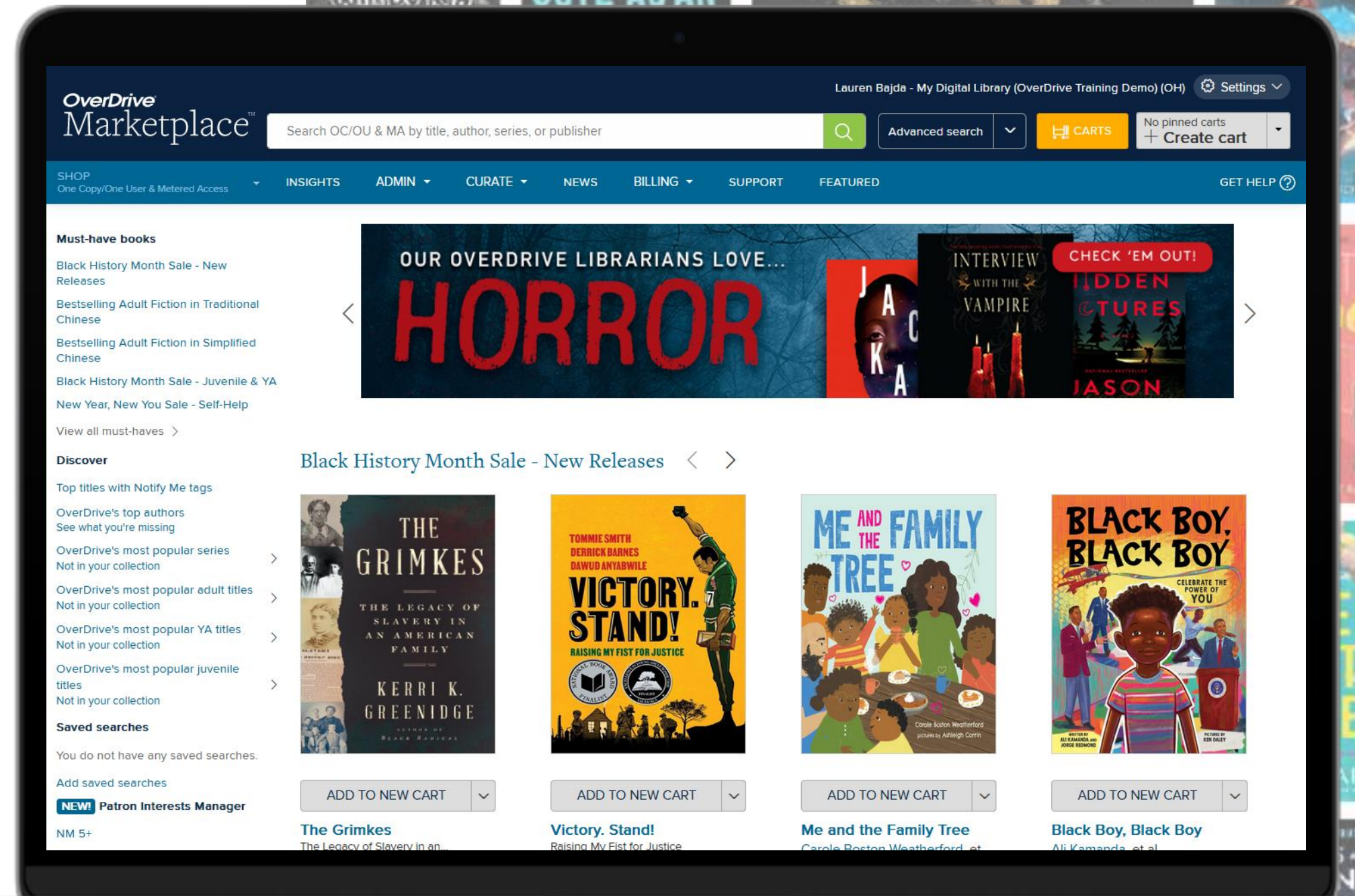




# Marketplace

Discover, select, and curate an exceptional collection of diverse digital titles in all subject areas.

Visit in your web browser at [marketplace.overdrive.com](https://marketplace.overdrive.com).





# Marketplace usernames

## Shared collection vs. Advantage

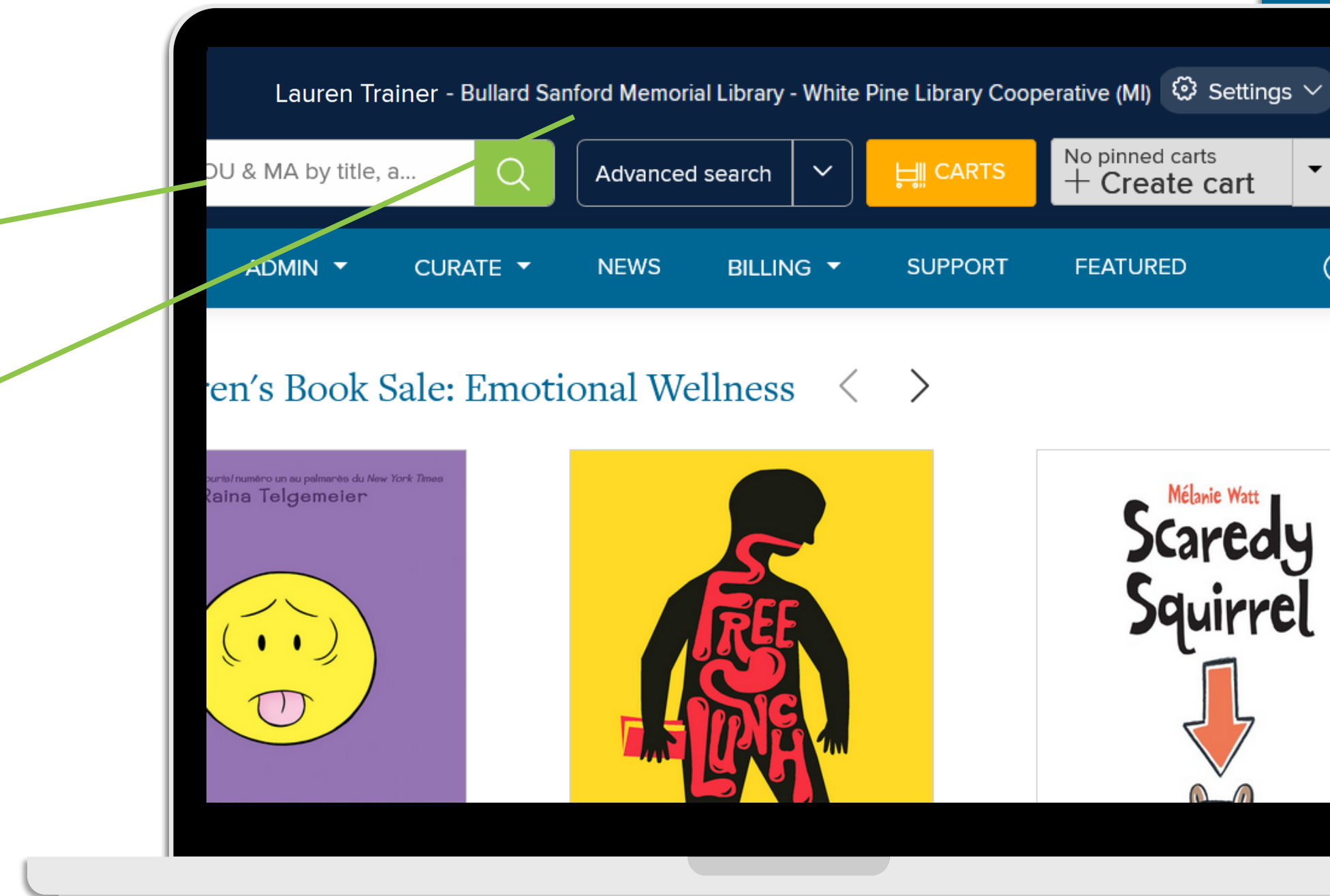
*Confirm which account you're signed into at the top of Marketplace.*

### Shared collection (consortium)

Username (ex): [whitepine.lib.ltrainer](#)

### Advantage collection

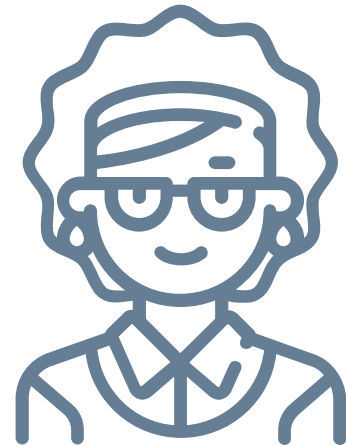
Username (ex): [whitepine.adv.bullardsanford](#)





# Advantage & Advantage Plus





**“I wish I could offer titles  
exclusively for my patrons.”**





**“I wish I could lower wait times on popular titles  
for my patrons.”**

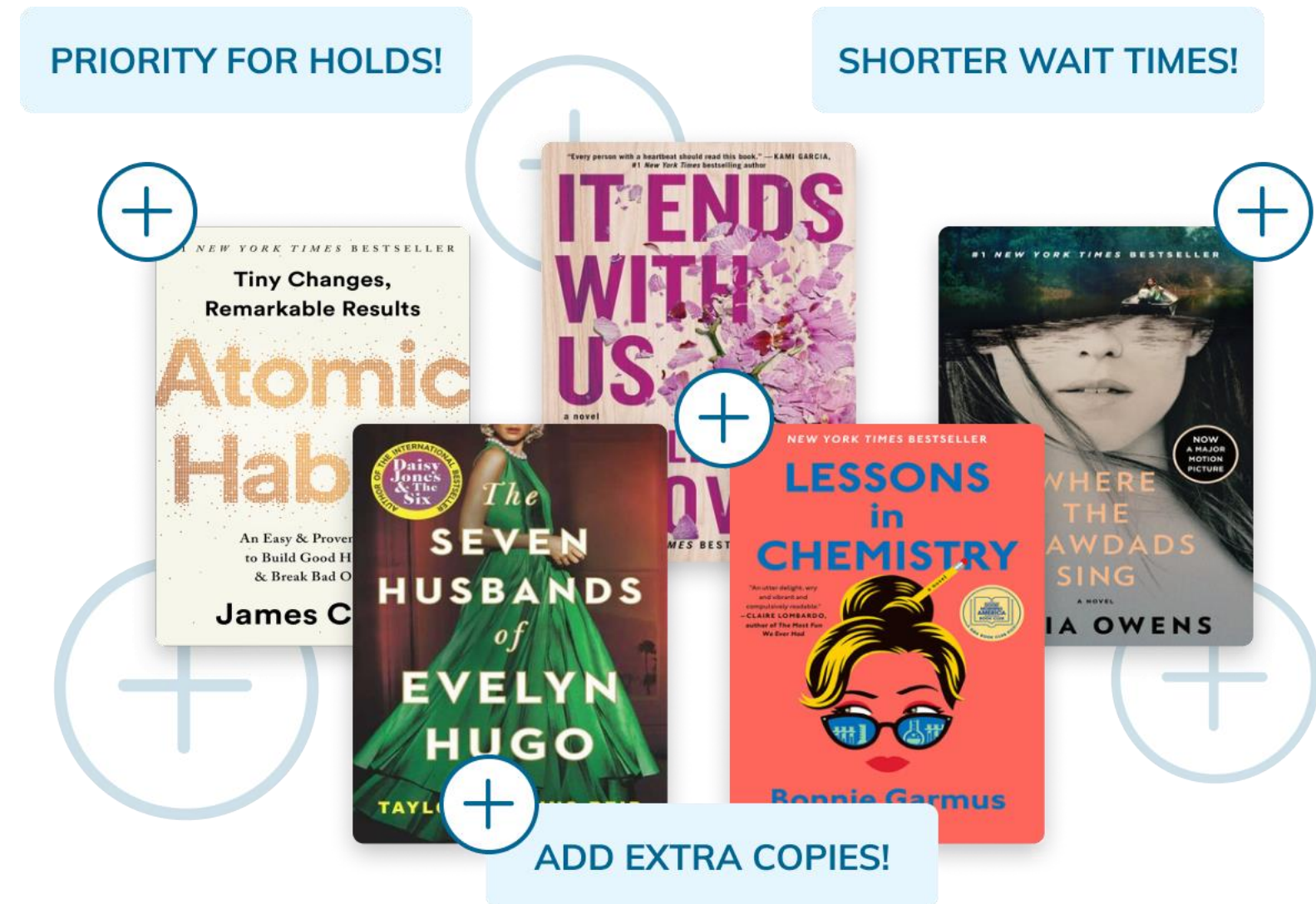


**"I wish I could customize lists  
in Libby for my branch."**

# What is Advantage?

Program that allows members of a consortium the ability to offer additional titles exclusively for their patrons.

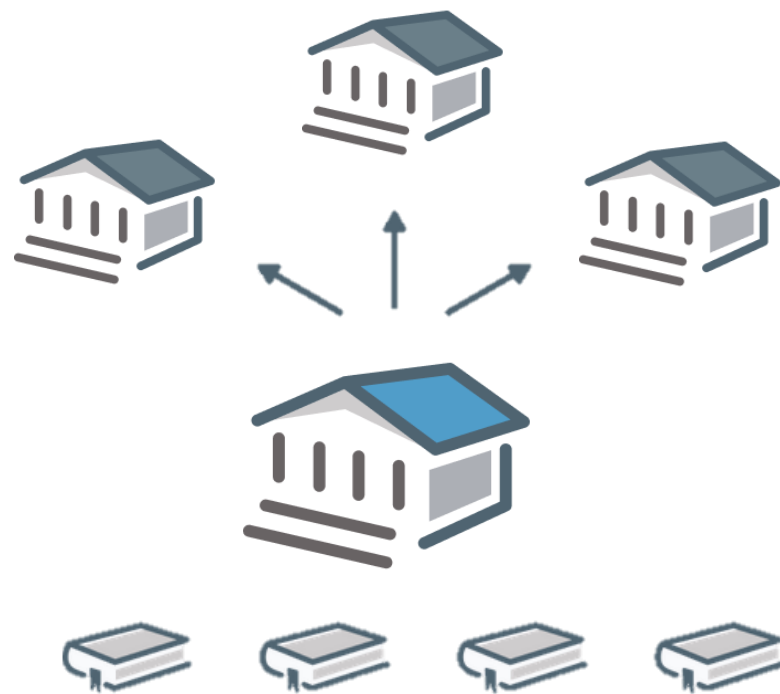
- Reduce wait times
- Offer additional titles
- Create custom collections





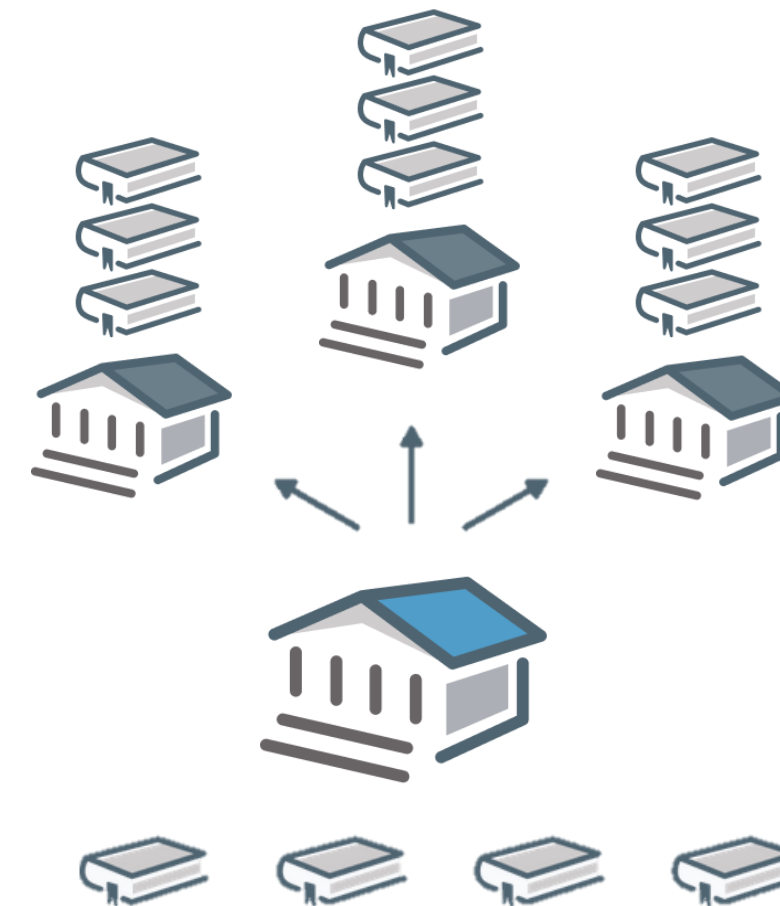
# Shared Collection

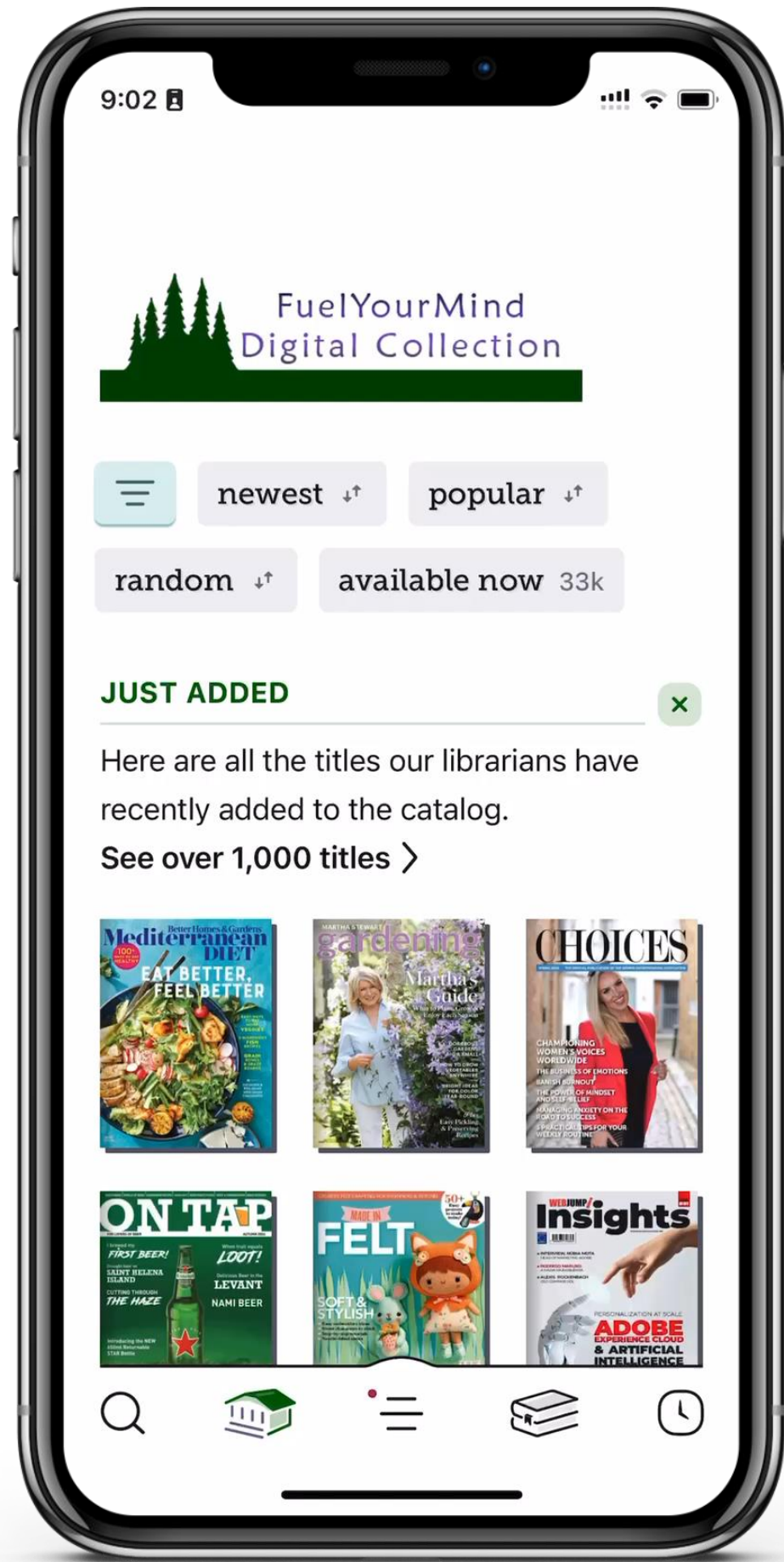
All libraries in a consortium have access to the main collection of materials.



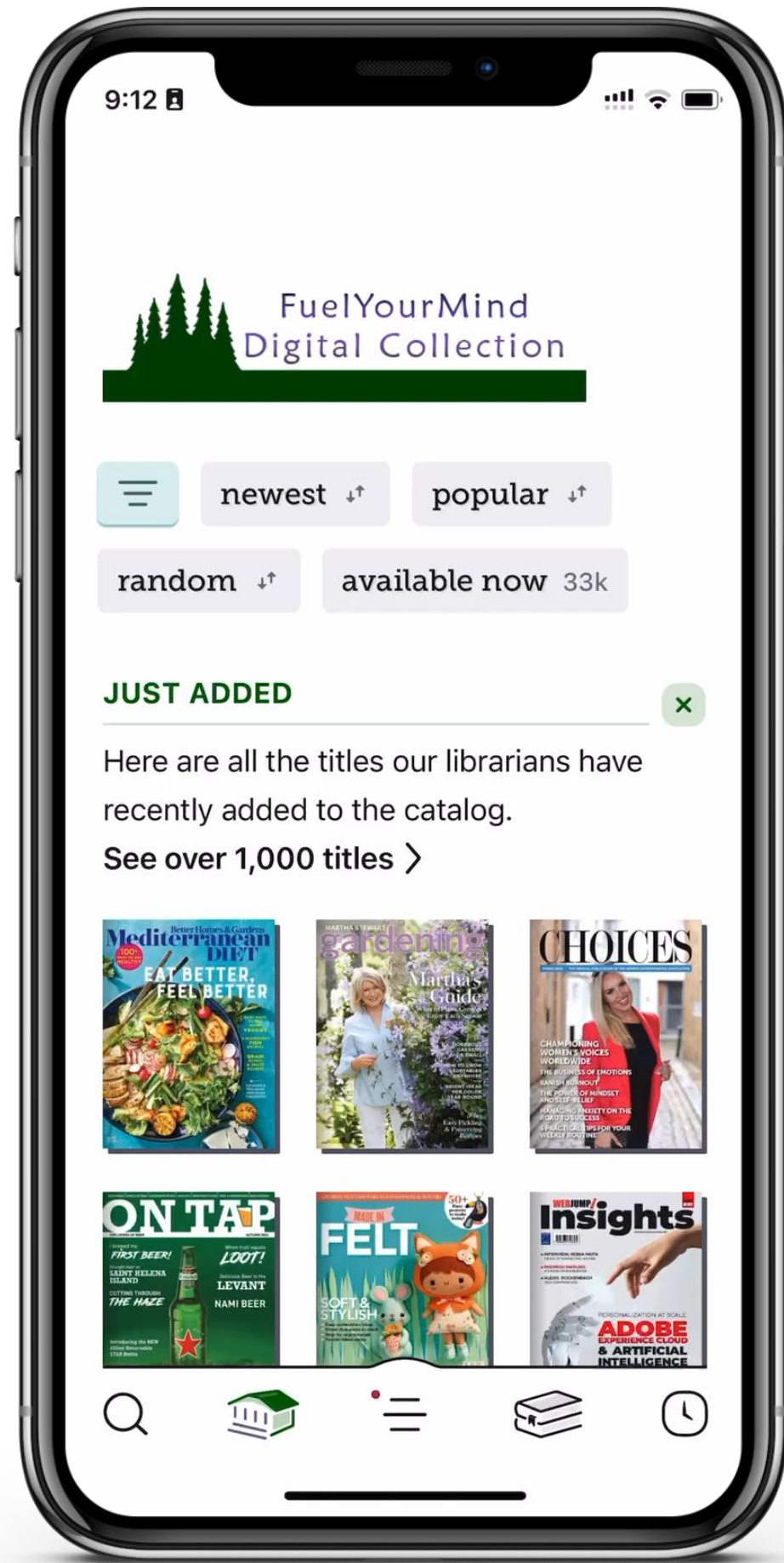
# Advantage

A sub-account that allows an individual library to purchase and curate additional content just for their users.

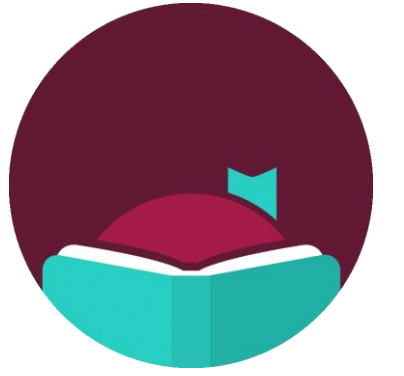




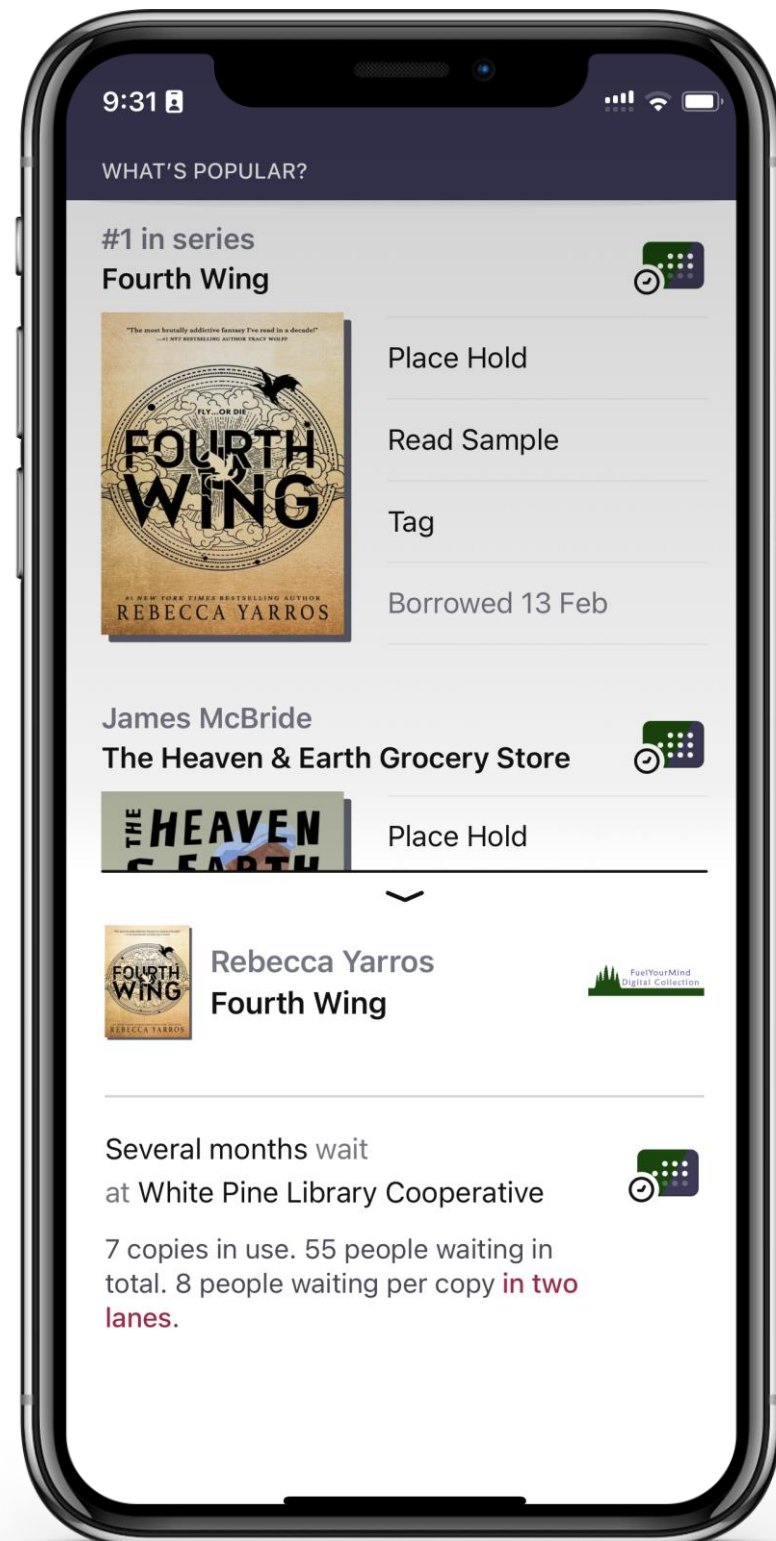
Shared collection  
White Pine Library Cooperative



Shared collection + Advantage  
Bullard Sanford Memorial Library



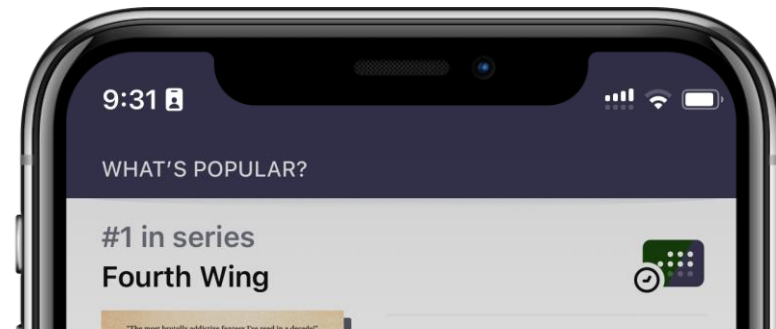
# How does it affect patron holds?



1. Advantage users join two separate lists:
  - Wait list for Advantage copy.
  - Wait list for shared collection copy.
2. User will receive whichever copy becomes available first.
3. Once a user receives a copy of the title, they're removed from both wait lists.



# How does it affect patron holds?



Some copies of this title belong to specific member libraries, and their patrons are given priority for holds on those copies. For this reason, you may jump forward or move backward in the line, so we can't accurately estimate wait time.

[Learn More At Libby Help](#)

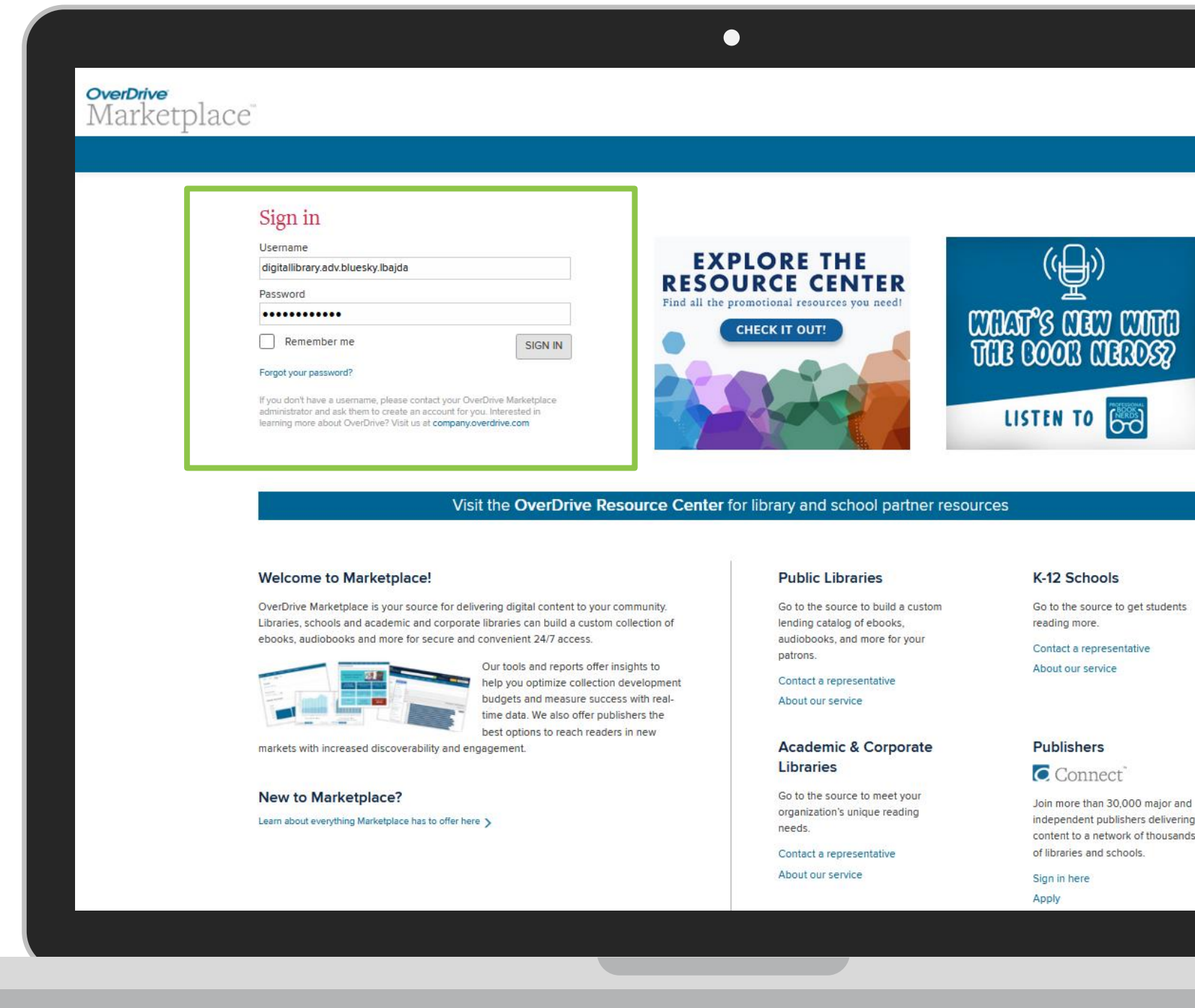
total. 8 people waiting per copy in two lanes.

1. Advantage users join two separate lists:
  - Wait list for Advantage copy.
  - Wait list for shared collection copy.
2. User will receive whichever copy becomes available first.
3. Once a user receives a copy of the title, they're removed from both wait lists.

# How does it affect staff?

It gives them more customization!

- Designated staff will sign into Marketplace with a new username.
- Staff can build, maintain, and grow an Advantage collection just for their users.



# Knowledge check

With Advantage, your users have access to all titles in the shared collection and your Advantage collection.

- True
- False





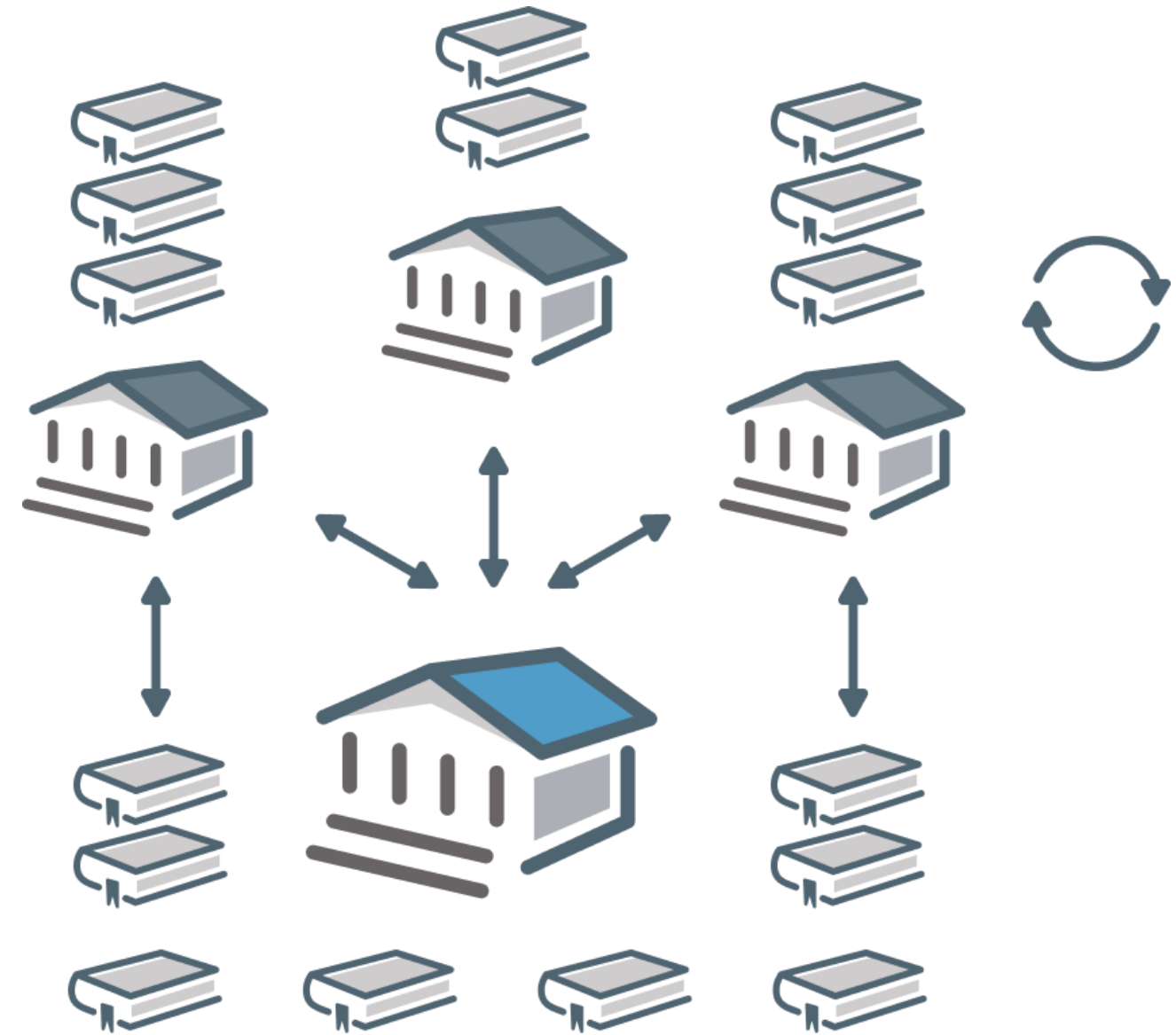


**“It would be beneficial if Advantage members shared titles from their Advantage collections to the shared collection.”**

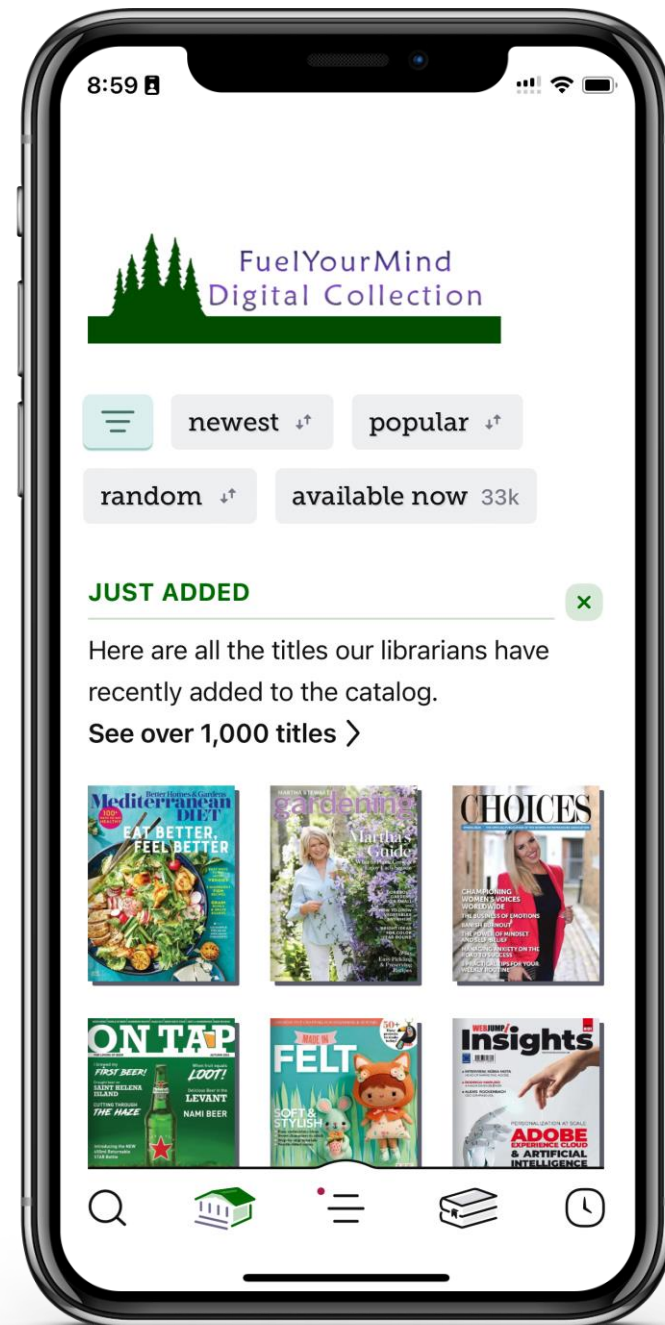
# What is Advantage Plus?

Expand access to your Advantage titles.

Enable Advantage Plus to improve title selection, availability, and circulation for all members of the shared collection.



# How does it affect patrons?



It gives them access to more content!

- Users will sign into Libby the same way they always have.
- Content displays *seamlessly*.



# White Pine Library Cooperative

## Advantage Plus

*These Advantage members have set up Advantage Plus plans*

### Advantage Plus plan

Your shared collection allows Advantage members to share content from their collections with the shared collection.

Titles are shared based on the Advantage Plus plan set up by the Advantage member.

These settings can't be changed.

**Note:** When an eligible title is shared, all copies of the title will be included.

### Important details

Individual Advantage members must set up Advantage Plus plans in Marketplace to share titles.

- Shared titles will still belong to the Advantage member. Users of any library or school in the shared collection can borrow or place holds on these titles, but Advantage users will have priority for holds.
- Titles with active checkouts or holds can be shared if the Advantage Plus plan allows it.
- All reports will show that the shared titles belong to the Advantage member.
- Your **Collection Usage** reports will include holds and checkouts for all users (shared collection and Advantage).
- By default, **MARC records** won't be ordered for shared titles.
- In order to move or share a title, the shared collection must support the title's format.

# Advantage Library: Has not set up Advantage Plus yet

SHOP  
One Copy/One User & Metered Access

INSIGHTS ADMIN CURATE NEWS BILLING SUPPORT FEATURED

Advantage Plus Marketplace users Weeding Local content MARC preferences

## Advantage Plus

By joining Advantage Plus, you can improve title availability and circulation in your shared collection.

### Advantage Plus plan

Your Advantage Plus plan will share eligible titles in your Advantage collection with the shared collection.

You can set up your Advantage Plus plan to run automatically and share all eligible titles on your behalf. You can also run your Advantage Plus plan manually whenever you'd liked to see a report of eligible titles and pick which ones you'd like to share.

**Note:** When an eligible title is shared, all copies of the title will be included.

### Important details

- Shared titles will still belong to the Advantage member. Users of any library or school in the shared collection can borrow or place holds on these titles, but Advantage users will have priority for holds.
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- By default, **MARC records** won't be ordered for shared titles.
- In order to move or share a title, the shared collection must support the title's format.

**Note:** You can edit your plan at any time. However, once a title is shared, it cannot be reversed.

+ CREATE NEW → REVIEW TITLES EDIT DELETE

# Advantage Library: Has set up Advantage Plus

## Advantage Plus

By joining Advantage Plus, you can improve title availability and circulation in your shared collection.

### Advantage Plus plan

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- In order to move or share a title, the shared collection must support the title's format.

**⚠ Note:** You can edit your plan at any time. However, once a title is shared, it cannot be reversed.

### Advantage Plus plan summary

Your plan is scheduled to run once a month, automatically. The next run date will be: 3/26/2024.

You can also review eligible titles and share them manually whenever you'd like.

**Note:** You can edit your plan at any time by clicking EDIT.

+ CREATE NEW

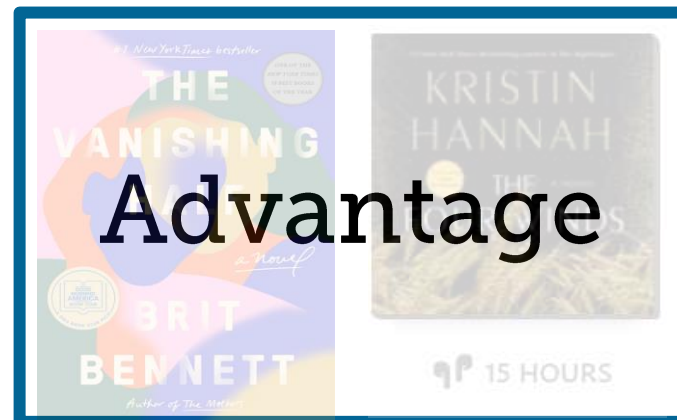
⇒ REVIEW TITLES

✎ EDIT

✕ DELETE



# Recap

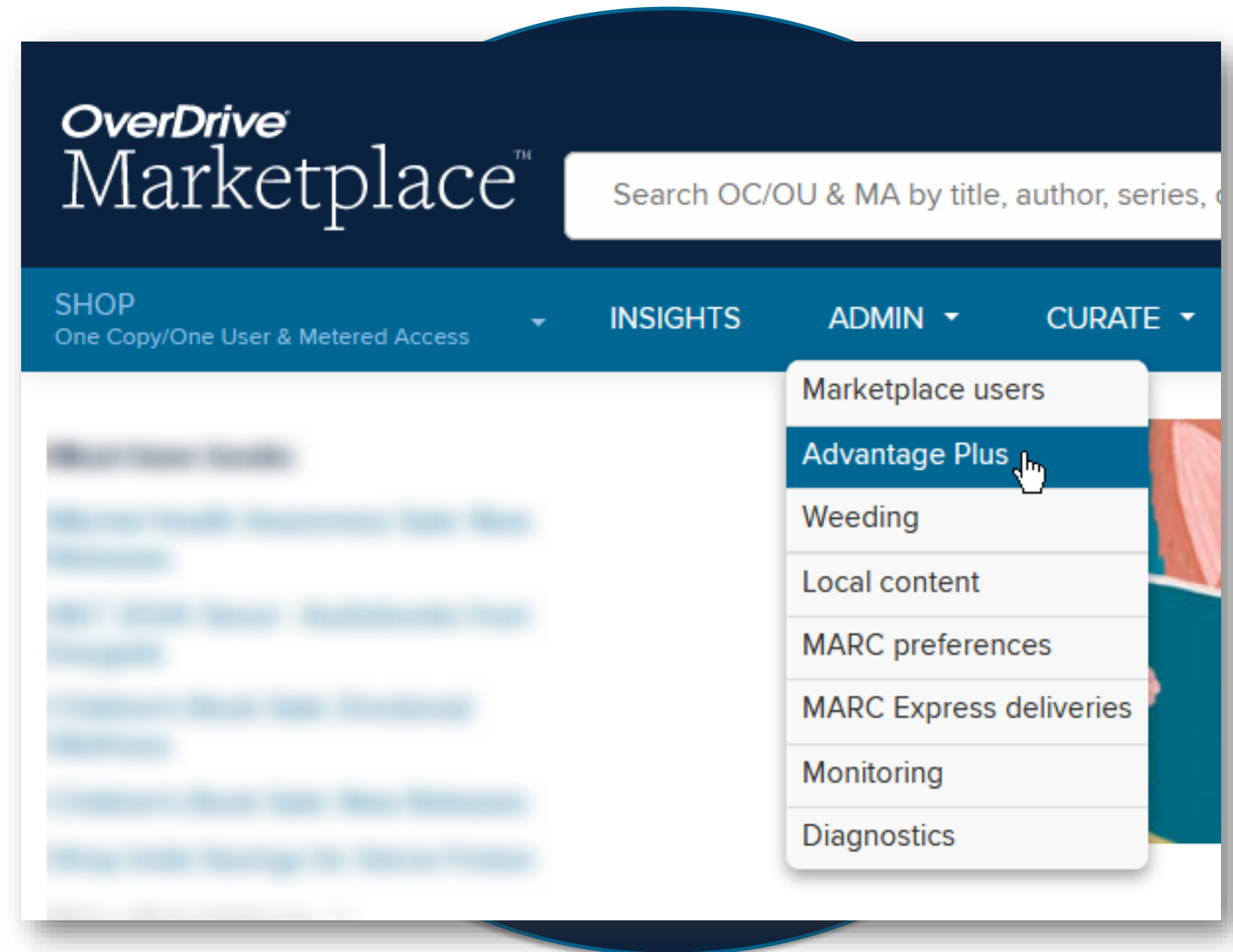


- Your consortium's main content collection.
- Designated branches share access to these titles.
- Custom collection of titles developed specifically for your library.
- Reduced wait lists on popular titles.
- Continued access to the shared collection.
- Share eligible titles from Advantage to the shared collection.
- Improve title selection, circulation, and availability for all members.
- Maintain priority on holds for your own users.

# Check-in poll

Has your Advantage library joined Advantage Plus?

- Yes
- No
- Unsure



# Advantage Plus general criteria

Sharing	
Lending models	✓ *Must be One Copy / One User or Metered Access.
Formats	✓ *Must be in a format the shared collection offers.
Active checkouts / holds	✓ *As long as they meet the other criteria in the Advantage Plus plan.
Weeded titles	✓ *As long as they meet the other criteria in the Advantage Plus plan.
Expired titles	✓ *As long as they meet the other criteria in the Advantage Plus plan.
Local content	X



# Common Questions & Misconceptions



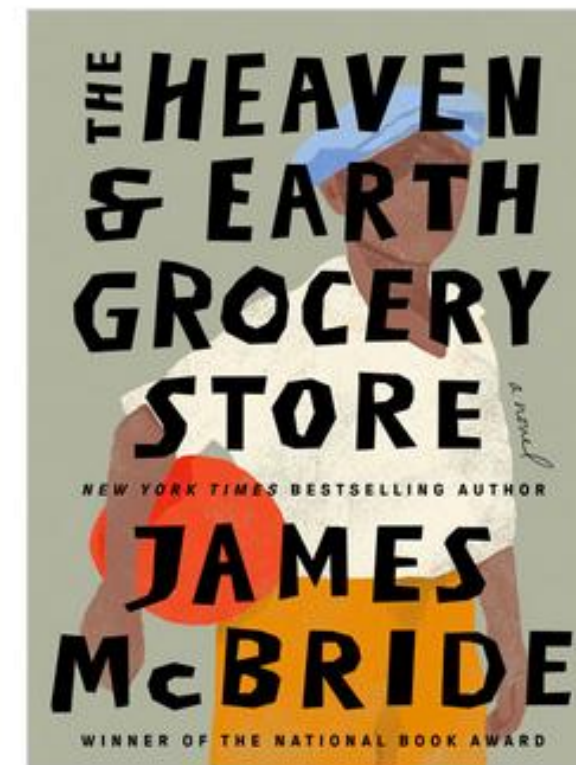


# 1. I don't have the money to build an Advantage collection.

Try these lending models:

- Cost Per Circ (CPC)
- OverDrive MAX

aka Metered Access Concurrent Use (MACU)



ADD CPC TITLE

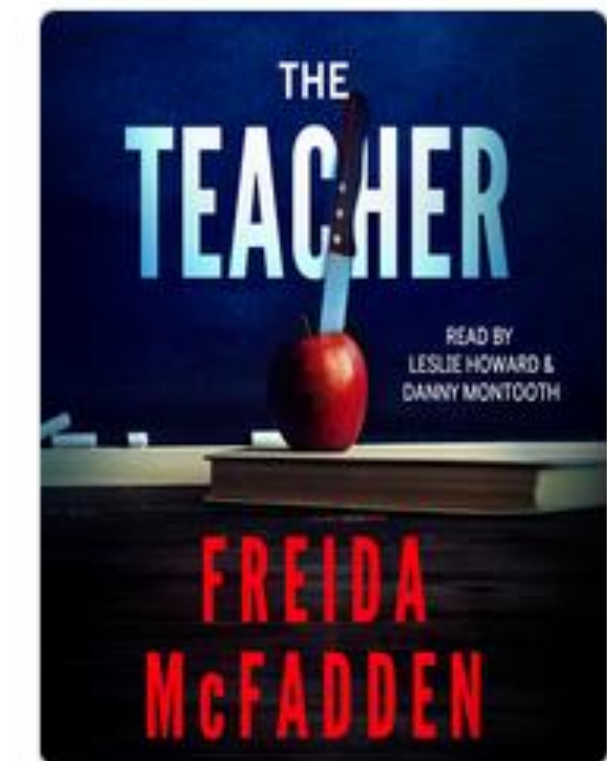
The Heaven & Earth Gro...

A Novel

James McBride

\$4.12

 Ebook



 Audiobook ▾

MA: 100 checkouts (concurrent users)

\$127.48

## 2. I don't have the time to maintain an Advantage collection.






















- Cart creation
- Recommendations for purchase
- Activate Cost per Circ titles
- Merchandising & curated collections
- Breadth of content and library knowledge

3. Is the Marketplace experience different for a shared collection log in and Advantage collection log in?



# What's the difference?

	Shared Collection	Advantage Collection
Unique username		
Purchase content	 (Consortium-wide access)	 (Individual library access)
Curate lists	 (Consortium-wide access)	 (Individual library access)
Insights and reports		
Contact OverDrive Support		
Change user and lending policies		
Weed titles		
Access invoicing/purchasing history		
Content transfers from other vendors		
Receive MARC records (optional)		





# Best Practices



## Advantage Best Practices for Libraries

Tips to build, maintain, and grow an OverDrive Advantage collection

Advantage is a program where members of a consortium can purchase and curate additional titles exclusively for their users. It's a great way to customize digital collections based on users' interests and reduce wait times for popular books. The following suggestions will help you build and maintain an Advantage collection in OverDrive Marketplace. If you have questions or need assistance with any of these items, contact your OverDrive team. **We are here and happy to help!**

### Build Advantage Collection



- **COORDINATE WITH THE CONSORTIUM**  
Reach out to your consortium and agree on your group's level of participation in Advantage. Is it opt-in or required? Are there any policies you must take into consideration for selection? How does Advantage collection development impact how holds are filled? Is [Advantage Plus](#) turned on? If so, is sharing required?
- **SIGN UP**  
Get started for free by reaching out your [OverDrive Account Manager](#).
- **SIGN IN**  
Log into [OverDrive Marketplace](#) with the Advantage username that has been set up for you. To tell the difference, consortium usernames include "lib" and Advantage usernames "adv"
- **PURCHASE**  
Buy titles exclusively for your users in Marketplace (unless participating in Advantage Plus). We recommend purchasing titles **on hold** to reduce wait times, purchasing titles with **Notify Me** tags to meet patron demand, and purchasing titles in **Cost Per Circ** to increase patron retention.
  - HOLDS**  
There are many ways to approach the purchasing of holds and it varies by library. Consider creating a [saved search](#), a [Holds Manager](#) plan, or reaching out to your Digital Content Librarian for advice.
  - NOTIFY ME TAGS**  
[Notify Me](#) is a feature in Libby that allows users to express interest in titles that aren't in your collection. You can view data about the titles your Advantage users tagged with Notify Me on title details pages and search results, Patron Interests Manager plans, and the Patron Interests dashboard.
  - COST PER CIRC (CRC)**  
Titles in the [CPC lending model](#) are great for Advantage because you purchase based entirely on usage for your users. The budget you set will only go to them.
- **CURATE LISTS**  
By default, your Advantage website and Libby display the same curated and automated lists as your consortium. Consider [enabling Advantage curation](#) to feature your Advantage collection and appeal to your community by going to Curate > Organize published lists. \*Once enabled, you won't receive any new lists created by your consortium. Your changes will only be visible to your Advantage users. [Reach out to your Digital Content Librarian](#) for guidance and tips!

Customize Advantage lists  YES  NO

The lists in this section are the same as your consortium's. To customize the lists for your Advantage account, change this setting to Yes.  
When you select Yes >

### Maintain Advantage collection



- **ORDER MARC RECORDS**  
Libraries can [order MARC records](#) for unique Advantage titles that aren't part of the shared consortium collection. If you have not yet selected a MARC record provider, visit Marketplace and Admin > MARC preferences to learn more. If you would like to enable MARC Express records, please contact your OverDrive Product Support Specialist.
- **VIEW MARKETPLACE REPORTS**  
Track the success of your Advantage collection with valuable insights. We recommend the **Checkouts**, **Current holds**, and **Title status & usage** reports.
- **CONTINUE TO PURCHASE CONTENT**  
Add titles at a regular cadence (weekly or monthly) to keep your collection fresh and circulating. Visit OverDrive's Resource Center for recommended lists. We suggest, ["Top of the List"](#).
- **CONTINUE TO CURATE LISTS**  
If you enabled Advantage curation, create and update engaging and timely lists. For inspiration, explore all of our [recommended lists](#).
- **MANAGE METERED ACCESS TITLES**  
Track expiring and expired Metered Access titles in your collection with [Metered Access Manager](#).
- **WEED TITLES**  
Create an [Automatic weeding plan](#) to weed Metered Access titles that have expired and do not have holds. \*Advantage accounts can only weed copies owned by your Advantage collection. To learn more about weeding, [watch this short video](#).
- **COORDINATE WITH THE CONSORTIUM**  
Keep communication with your consortium open! Set up a regular meeting with your consortium coordinator to see how they're managing the shared collection and get tips from your fellow Advantage accounts.

### Grow Advantage collection

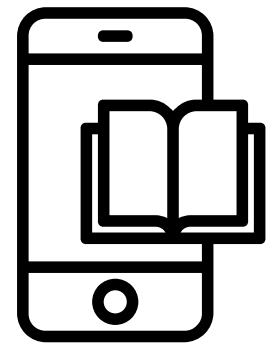


- **LIBBY EXTRAS**  
Consider purchasing Libby Extras: [Databases and Streaming Media services](#) that entertain, educate, and provide unique digital experiences for your users only.
- **ADVANTAGE PLUS**  
Talk to your consortium about turning on [Advantage Plus](#). It's a free Marketplace feature where Advantage members can expand access to their Advantage titles, by sharing them with all users of the consortium's libraries. It's designed to improve title selection, circulation, and availability for all members of a shared collection while still allowing your users to be at the front of the line for holds on your copies of the title.

### CONTACT YOUR OVERDRIVE ACCOUNT MANAGER TODAY!

Overdrive.com/libraries | libraryteam@overdrive.com | (216) 573-6886

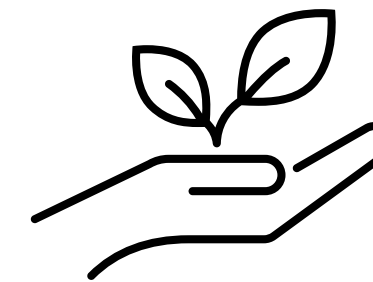
# Best practices



Build



Maintain



Grow



# Build Advantage collection

Sign into Marketplace with your Advantage username.



Purchase titles exclusively for your users.

We recommend purchasing titles:

On hold

With Notify Me tags

In various lending models, like CPC

Consider enabling Advantage curation.





# Maintain Advantage collection

❑ Order MARC records.



❑ Visit Marketplace reports.

❑ Checkouts

❑ Current holds

❑ Title status & usage

❑ Continue to purchase content.

The image displays three overlapping screenshots from the OverDrive Marketplace interface. The top-left screenshot, titled "MARC record provider options", lists three options: BDS MARC records (included with BDS subscription), eBiblioFile MARC records (charge), and OCLC MARC records (charge). The top-right screenshot shows a "Marketplace" report with a table of checkouts. The bottom screenshot shows the product page for "Dark Angel" by John Sandford, with a price of \$27.50 and options for 12 or 24 months of access.

Day (15)	Checkouts	Checkouts (chart)
2023-01-01	2,431	
2023-01-02	2,431	
2023-02-01	2,431	
2023-04-01	2,252	
2023-01-08	2,246	
2023-05-01	2,131	
2023-02-04	2,099	
2023-02-03	2,083	
2023-02-06	2,068	
2023-01-03	2,053	
2023-01-23	2,052	
2023-02-05	2,052	
2023-01-29	2,042	
2023-02-18	2,040	
2023-01-15	2,035	
2023-04-23	2,018	
2023-01-24	2,004	
2023-02-15	2,003	

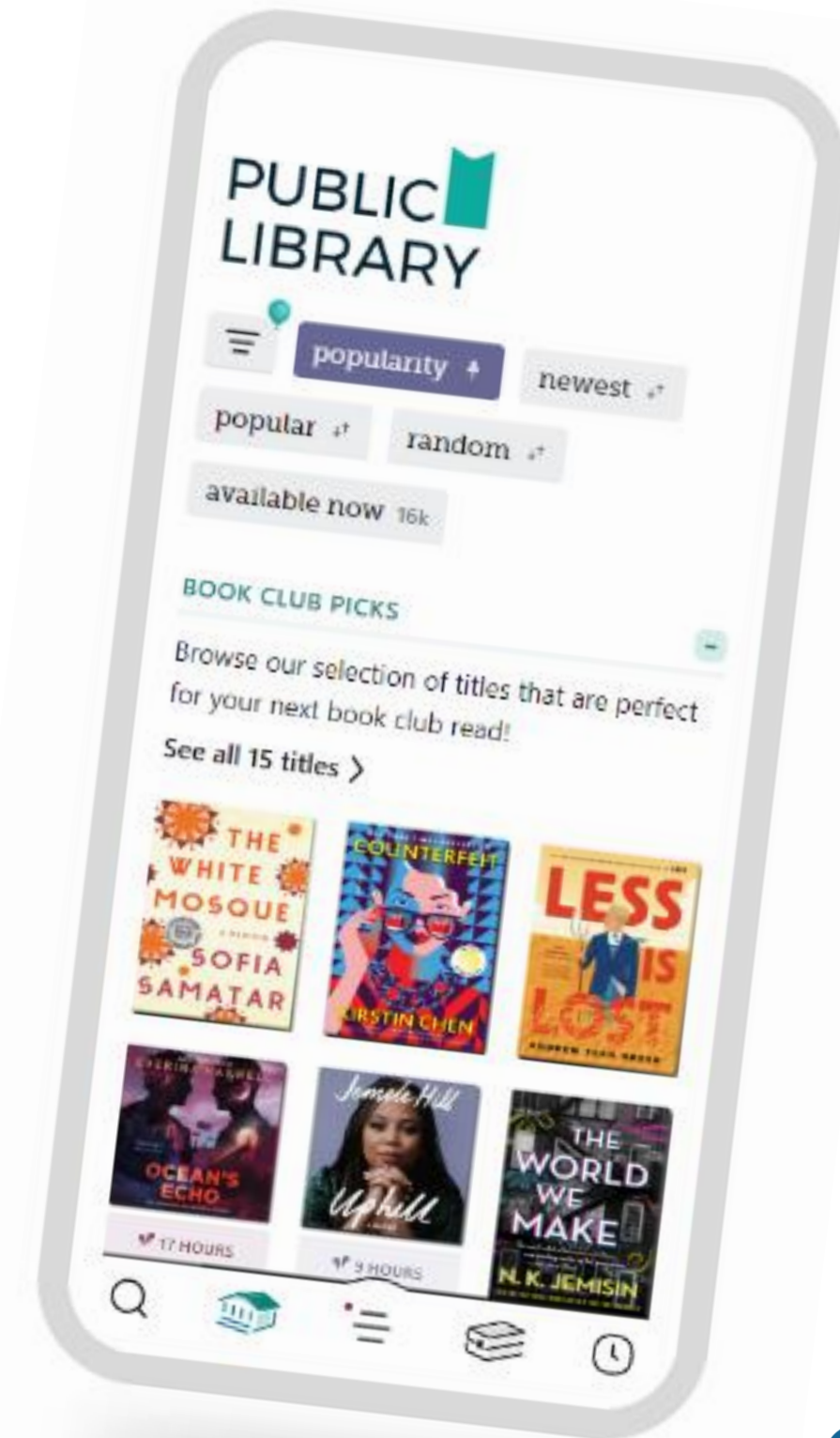
**Dark Angel** by John Sandford  
From \$27.50

MA: 12 months (one user)	MA: 24 months (one user)	Units: 0	ADD TO MAIN CART
\$27.50	\$55.00		

Language: English  
Street date: 4/11/2023  
Publisher: Penguin Group (USA), Inc.  
ISBN: 9780593422427

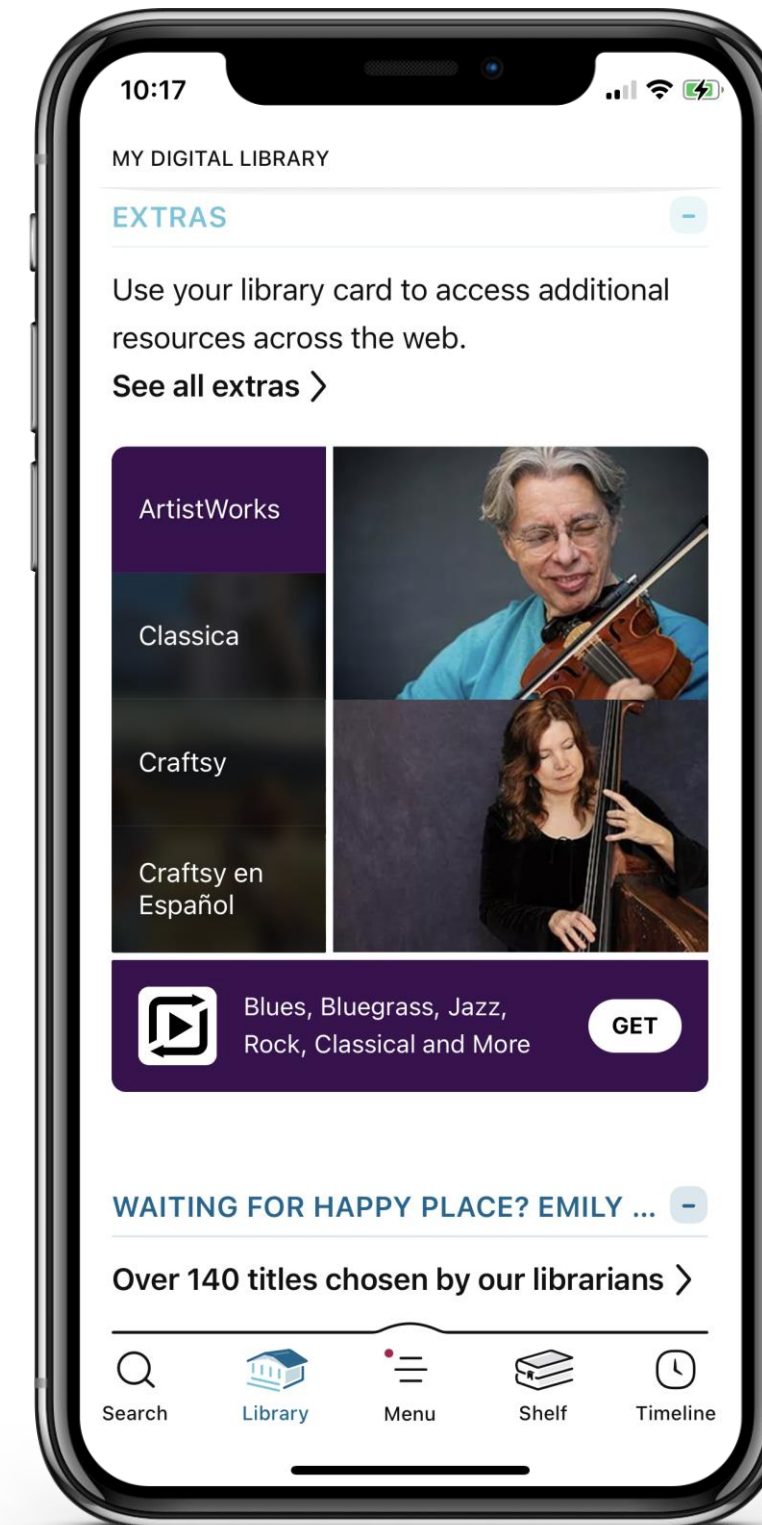
# Maintain Advantage collection

- Continue to curate lists.
- Manage Metered Access titles.
- ★  Weed titles.
- Coordinate with the consortium.

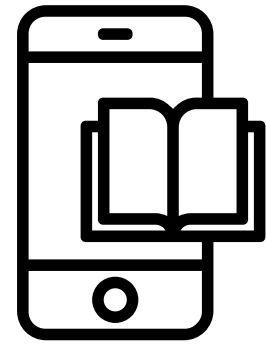


# Grow Advantage collection

- ❑ Consider purchasing Libby Extras.
- ★ ❑ Share eligible titles through Advantage Plus.



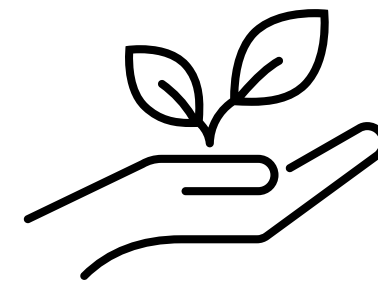
# Recap



Build



Maintain



Grow



# Resources

- Help articles & videos

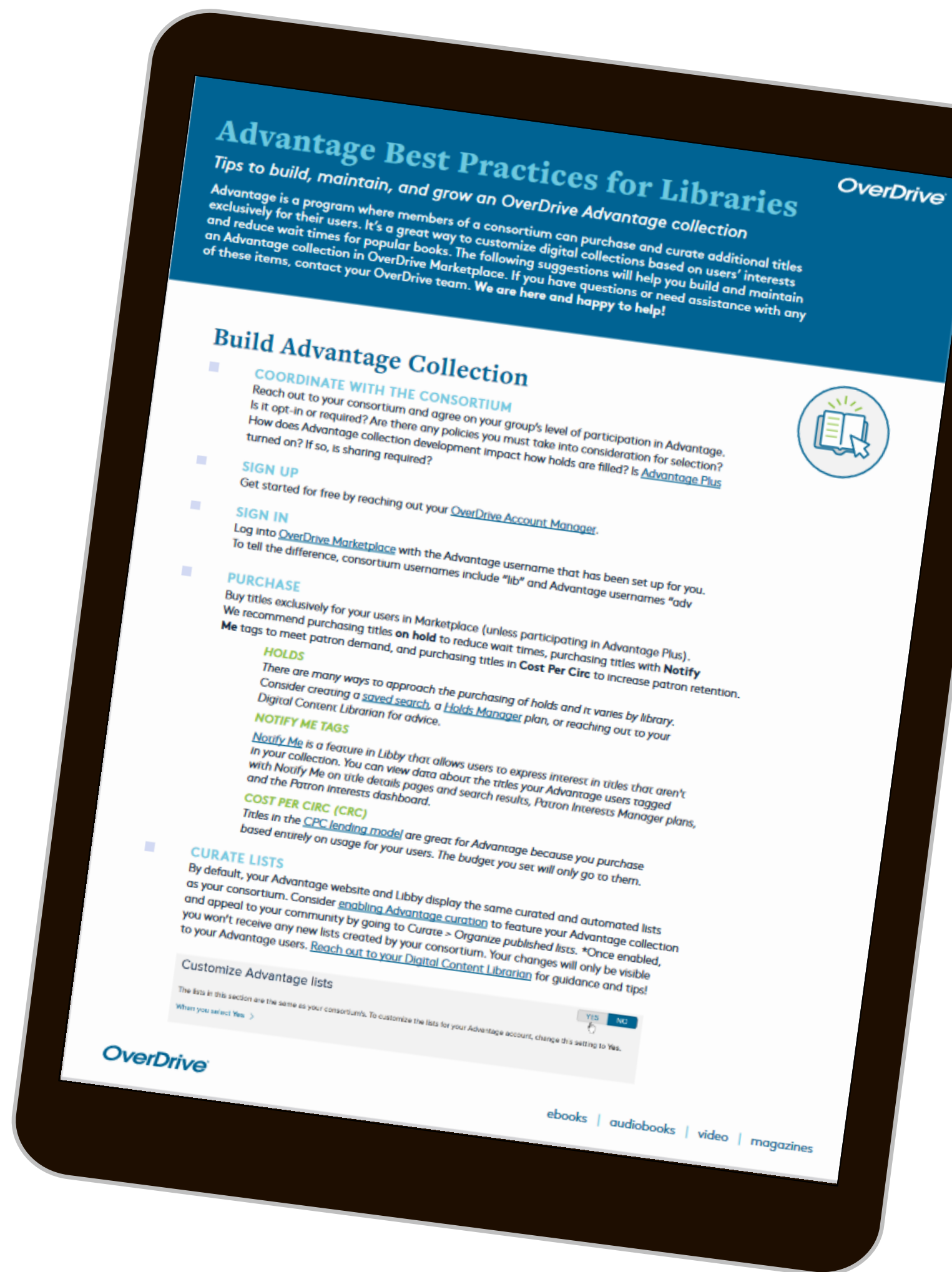
[help.marketplace.overdrive.com](https://help.marketplace.overdrive.com)

- Best practices sheet

[link.overdrive.com/Library-Advantage-best-practices](https://link.overdrive.com/Library-Advantage-best-practices)


- OverDrive Account Team

[marketplace.overdrive.com/Support](https://marketplace.overdrive.com/Support)





# Q&A





# *OverDrive*<sup>®</sup>

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[overdrive.com](https://overdrive.com)