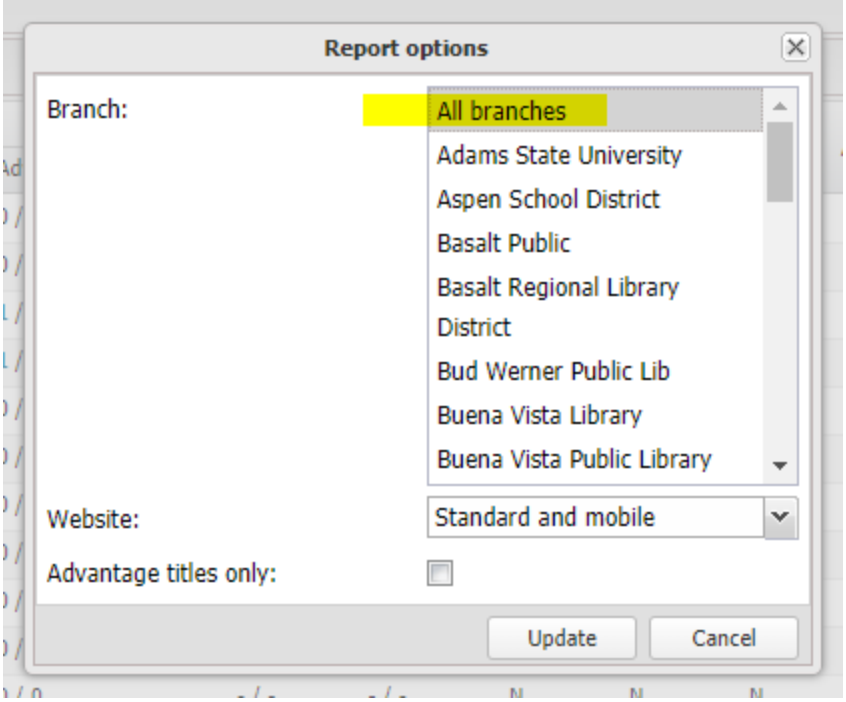
Hold Management Strategies

(Sept. 25, 2018)

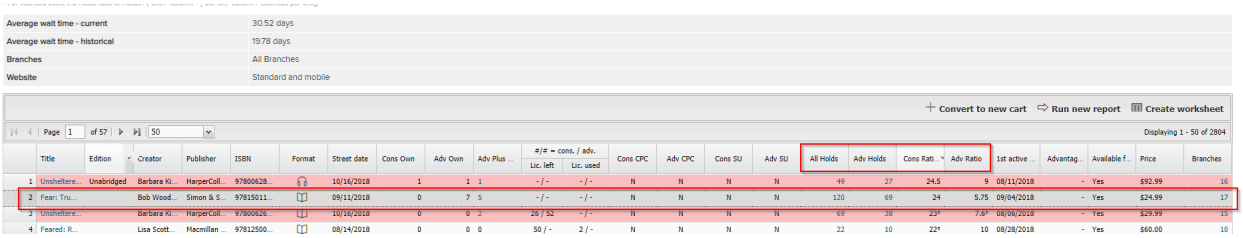
Manual Management of Popular Titles

If you have limited dollars, but want to ensure that your patrons do not wait too long, or you wish to discover how many are waiting, you could do this manually whenever you had time and/or money.

1. **Login** to Overdrive - you can use your Advantage login or Marmot login, but we recommend the Advantage login if you are now an Advantage Plus library.
2. Navigate to **Insights** > **Reports**
3. Select **Current Waiting List**
4. Opt to **Run a New Report** and make sure **All branches** is selected



5. Sort the **All Holds** or **Cons Ratio** column by **descending order** (puts items with the most holds at the top of the list)



Average wait time - current	30.52 days
Average wait time - historical	19.78 days
Branches	All Branches
Website	Standard and mobile

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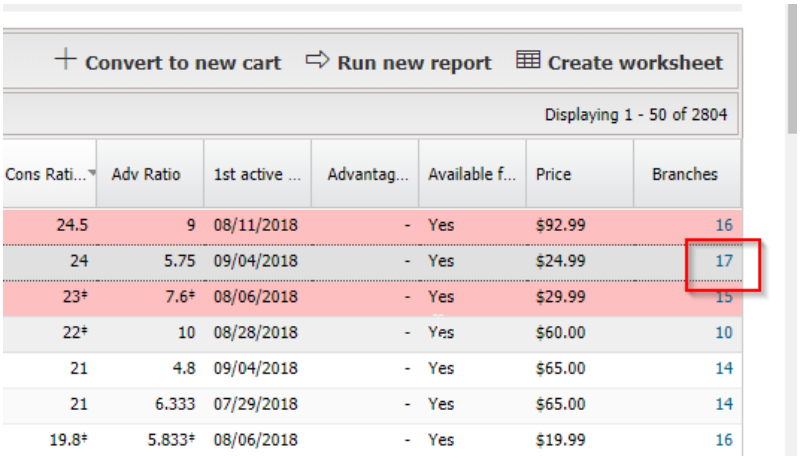
	Title	Edition	Creator	Publisher	ISBN	Format	Street date	Cons Own	Adv Own	Adv Plus ...	#/# = cons. / adv. Lic. left	Lic. used	Cons CPC	Adv CPC	Cons SU	Adv SU	All Holds	Adv Holds	Cons Rati...	Adv Ratio	1st active ...	Advantag...	Available f...	Price	Branches
1	Unsheltere...	Unabridged	Barbara Ki...	HarperColl...	97800628...		10/16/2018	1	1	1	- / -	- / -	N	N	N	N	49	27	24.5	9	08/11/2018	-	Yes	$92.99	16
2	Fear: Tru...		Bob Wood...	Simon & S...	97815011...		09/11/2018	0	7	5	- / -	- / -	N	N	N	N	120	69	24	5.75	09/04/2018	-	Yes	$24.99	17
3	Unsheltere...		Barbara Ki...	HarperColl...	97800626...		10/16/2018	0	0	2	26 / 52	- / -	N	N	N	N	69	38	23‡	7.6‡	08/06/2018	-	Yes	$29.99	15
4	Feared: R...		Lisa Scott...	Macmillan ...	97812500...		08/14/2018	0	0	0	50 / -	2 / -	N	N	N	N	22	10	22‡	10	08/28/2018	-	Yes	$60.00	10

a. On the far right is the **Branches Column** -- If you click on the number presented in that column - it will take you to the number of holds your institution has on this title



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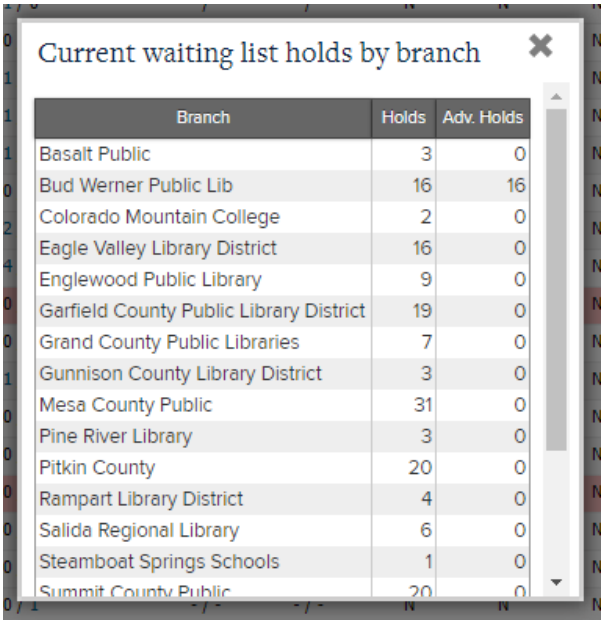
Cons Rati...	Adv Ratio	1st active ...	Advantag...	Available f...	Price	Branches
24.5	9	08/11/2018	-	Yes	$92.99	16
24	5.75	09/04/2018	-	Yes	$24.99	17
23‡	7.6‡	08/06/2018	-	Yes	$29.99	15
22‡	10	08/28/2018	-	Yes	$60.00	10
21	4.8	09/04/2018	-	Yes	$65.00	14
21	6.333	07/29/2018	-	Yes	$65.00	14
19.8‡	5.833‡	08/06/2018	-	Yes	$19.99	16



Current waiting list holds by branch

Branch	Holds	Adv. Holds
Basalt Public	3	0
Bud Werner Public Lib	16	16
Colorado Mountain College	2	0
Eagle Valley Library District	16	0
Englewood Public Library	9	0
Garfield County Public Library District	19	0
Grand County Public Libraries	7	0
Gunnison County Library District	3	0
Mesa County Public	31	0
Pine River Library	3	0
Pitkin County	20	0
Rampart Library District	4	0
Salida Regional Library	6	0
Steamboat Springs Schools	1	0
Summit County Public	20	0

b. If you look at the **Cons Own** column you'll see how many copies are circulating in the collective
c. If you look at the **Adv Plus Shared Column** you'll see how many Advantage copies have been shared (cons # / your Adv #)

	Cons Ow...	Adv Own	#/# = cons. / adv.		
			Adv Plus Shared	Lic. left	Lic. used
..	1	1	0 / 1	- / -	- / -
..	0	1	1 / 1	- / -	- / -
..	2	1	0 / 0	- / -	- / -
..	1	5	0 / 5	- / -	- / -
..	0	0	0 / 0	50 / -	2 / -
..	0	0	0 / 0	2 / 25	128 / 1

6. How quickly your patron will get the title is therefore dependent upon the number of Adv Plus copies that have been shared and whether those institutions have holds, and whether there is a copy that is owned by the consortium.
7. Once you have determined that you need to buy a copy for your institution, click on a title and from there you can add it to a cart.

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	Title	Edition	Creator	Publi...	ISBN	Format	Stree...	Co
1	Unsheltered: A Novel (unabridged)	Unab...	Barb...	Harp...	9780...		10/1...	
2	Depth of Winter		Craig...	Peng...	9780...		09/0...	
3	Lethal White		Robe...	Hach...	9780...		09/1...	
4	Fear: Trump in the White House		Bob ...	Simo...	9781...		09/1...	
5	Feared: Rosato & DiNunzio Series, Book 6		Lisa ...	Mac...	9781...		08/1...	
6	The Subtle Art of Not Giving a F*ck: A Counteri...		Mark ...	Harp...	9780...		09/1...	
7	Texas Ranger	Unab...	Jame...	Black...	9781...		08/1...	

8. **After buying the cart, be sure to share these titles**. Since your patron is on hold, they will get it first.

Automatic Management of Popular Titles

If you don't want to manage holds manually, and you do have dollars to spend, consider setting up an automatic buying plan in your Advantage Login using these instructions: https://help.marketplace.overdrive.com/customer/en/portal/articles/2669834-what-is-holds-manager-and-how-do-i-use-it-?b_id=15212

This is how Bud Werner manages their holds and we HIGHLY recommend this process. We use a ratio of 3 to 1, but set it higher if you do not have a large budget.

We share these titles manually each week. Since your patrons are on hold for the title - your new copy will go to them first.

Expired Hold Management - Revised 03/13/2019

Due to the myriad of leasing options, titles expire within one to two years. Because it is cost prohibitive to automatically re-purchase titles, Marmot has opted to not weed them and instead re-purchase them only when a hold has been placed.

To capture all of the possible permutations for expired titles, 4 lists should be run according to your hold management policy schedule - **failure to do so may mean that your patron's hold will never be filled**. Bud Werner does this weekly.

Once a cart has been purchased, share with the collective immediately. Since your patrons are on hold for the title - your new copy will go to them first.

Here are the official instructions on Overdrive on how to set up these lists - you need to be logged into your Advantage account.

And here is Bud Werner's logic - the highlighted part is what gets changed for each search.

Expired Advantage Titles With No Checkouts Left that Have Your Holds

- Check the boxes to Search for eBooks, Audiobooks, Video
- On-Sale date = All on-sale dates
- Street date = all street dates
- Price = All prices
- Lending Model = leave blank for all
- Holdings = (Adv) MA: 0 checkouts remaining
- Holds = 1 or more Advantage
- Use the remaining defaults

Expired Advantage Titles with No Time Left that Have Your Holds

- Check the boxes to Search for eBooks, Audiobooks, Video
- On-Sale date = All on-sale dates
- Street date = all street dates
- Price = All prices
- Lending Model = leave blank for all
- Holdings = (Adv) MA: 0 days remaining
- Holds = 1 or more Advantage
- Use the remaining defaults

Consortia Titles With No Checkouts Left that Have Your Holds

- Check the boxes to Search for eBooks, Audiobooks, Video
- On-Sale date = All on-sale dates
- Street date = all street dates
- Price = All prices
- Lending Model = leave blank for all
- Holdings = (Cons.) MA: 0 checkouts remaining
- Holds = 1 or more Advantage
- Use the remaining defaults

Consortia Titles No with Time Left that Have Your Holds

- Check the boxes to Search for eBooks, Audiobooks, Video
- On-Sale date = All on-sale dates
- Street date = all street dates
- Price = All prices
- Lending Model = leave blank for all
- Holdings = (Cons) MA: 0 days remaining
- Holds = 1 or more Advantage
- Use the remaining defaults