

IDL Best Practices

The following guidelines represent observations and lessons learned from the volunteers who help manage the consortium. The guidelines below will support responsive, effective collections.

Keep ordering simple.

Develop simple, repeatable, and trainable processes. Recommended regular ordering should only require about 30 minutes and is trainable at various staff levels.

Order regularly.

Establish a regular ordering schedule or routine to maintain responsive collections. Spend evenly throughout the year to build patron trust. Ordering weekly is recommended, as new titles are released every week, and demand changes rapidly.

Prioritize expenditures for your patrons.

Use platform tools, such as the Current Holds Report or the Patron Interests Manager, to prioritize expenditures based on your patrons' demand:

1. Purchase expired consortial titles with holds from your patrons
2. Purchase high-demand titles with a high holds ratio
3. Purchase in-demand titles that no one owns, such as those with Notify Me tags

Many IDL members favor these patron-driven practices over more traditional collection development practices.

Optimize lending models.

Choose lending models that will effectively balance short-term and long-term patron demand.

1. If no OC/OU copy is owned, consider purchasing 1 before purchasing MA options.
2. If an OC/OU model is already owned, purchase additional copies in the least expensive option available.
3. In general, choose the lower MA by time option (12 months instead of 24 months).