

Checklist: Construct your Custom Holdings

Part 2 of the OCLC Resource Sharing Workshop Series

Review basic uses of Custom Holdings

- Set up deflections – applying policies to a single group of libraries or to all libraries **except** a group of libraries. Create a Custom Holdings Group for that!
- Set up automations (Direct Request today) to route requests to Custom Holdings Paths
- Use Custom Holdings Paths to auto-populate lender strings in WorldShare ILL and Tipasa

Building Custom Holdings Groups and Paths

OCLC Policies Directory

- Search to build Custom Holdings Groups based on your needs:
 - Libraries by geography
 - Libraries by profiled group (e.g., LVIS, OhioLINK, PASCAL)
 - Libraries by days to respond
 - Libraries by current supplier status
 - Libraries by library type (e.g., academic, public, federal)
 - Combinations of these criteria that are meaningful to you

Combine Custom Holdings Groups into Custom Holdings Paths with OCLC Service Configuration

- Order matters – put your highest prioritized groups first in the paths
- Prioritize different paths for reasons that matter most for those requests (e.g., nearby geography and low cost for loan requests, fast time to respond and high fill rates for copies)

Assessing Custom Holdings – a basic routine

OCLC Usage Statistics (www.stats.oclc.org)

- Review the **Lender String Report** (under **Assessment Tools**) at least yearly
- Export to Excel and sort or filter by fill rate or time to respond – or combine both
- Review data separately for copy and loan requests (Loans are indicated as **Originals** in the report)
- Place your highest performing lenders (for each copy and loan requests) into their own Custom Holdings Groups. Make those groups first in the Custom Holdings Paths you use to request copies and loans, respectively.
- Identify lenders that have fallen below a threshold you define of acceptable lending performance (less than x% fill rate and more than y days to respond). Consider removing those lenders from your existing Custom Holdings Groups.
- Review the **Resource Sharing Borrower Reasons For No Report** monthly
- If you want, retrieve data from that report separately from the last few months and combine into one spreadsheet
- Sort by potential lender symbol and look for lenders that habitually let your requests age
- Remove those lenders from existing Custom Holdings Groups