Using ILS Reports for Collection Development

IOWA LIBRARY ASSOCIATION
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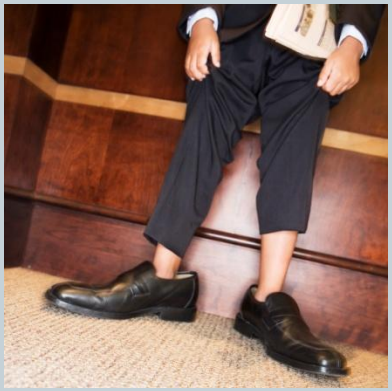
ILS?

- ILS = Integrated Library System
  - Also Known As
    - Automated System
    - Online Catalog
- (Almost?) All ILS have integrated report modules
  - Canned reports (those created by the ILS vendor)
  - Custom reports (those a library creates for itself)
  - Related report writing tool

Collection Development Isn't One Size Fits All

- You and your Board of Trustees decide what matters most in your community
  - More or less of particular formats (e.g., DVDs)
  - Duplicate copies
- Your collection development policy guides your purchases and withdrawals



Use ILS Reports to Determine

- Low Circulation
  - What titles to withdraw
  - What types of titles not to purchase
- High Circulation
  - What types of titles to purchase based on high circulation
  - What titles to purchase in multiple quantity
- Holds
  - What titles to purchase in multiple quantity
- Collection Use
  - Where to spend collection development dollars

Configuring Your ILS for Useful Results

- Break library into collections:
  - Adult Fiction
  - Adult Large Print
  - Juvenile Chapter Books
  - Juvenile DVDs
- A "Collection" Exists Every Time You Start the Alphabet or Numbering Over Again
  - FIC AAA – FIC ZZZ
  - W AAA – W ZZZ
  - 001 AAA – 999 ZZZ
  - J 001 AAA – J 999 ZZZ

Configuring Your ILS for Useful Results

- Follow State Library Guidelines for Counting Patrons
  - City residents
  - Contracting city residents
  - Rural county residents
  - Open Access residents
  - All other

F10 Circulation to your own city

F11 Circulation to contracting cities

F12 Circulation to the rural population of your own county

F13 Open Access circulation

F14 Circulation to all other borrower types (Include circulation for downloadable audio, video, or eBooks)

Configuring Your ILS for Useful Results

- Emphasize circulation of juvenile materials over age of patron
  - How many children's materials were checked out; not how old was the person who checked them out
  - Everyone ages, so counting patrons by age is a continually moving target

Circulation to children and young adults: Questions F16 and F17 reflect total circulation to children and young adults. These counts are part of the total as reported on line F09.

F16 Total circulation of all materials cataloged as "children's" _____

F17 Total circulation of all materials cataloged as "young adult" _____

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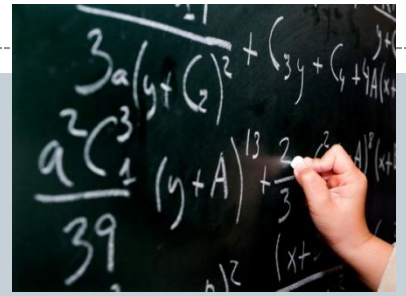
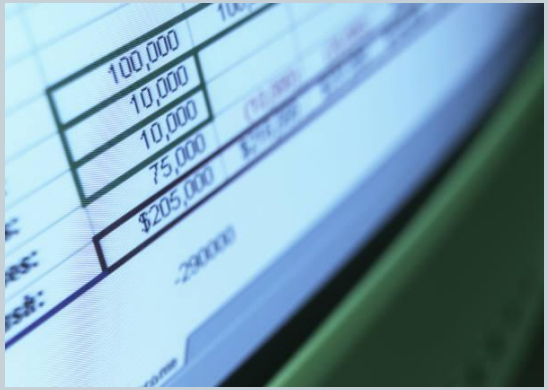
Numbers for the Math-Challenged



- Round to whole numbers
  - No one wants to check out half a book
- Use percentages to make the numbers more comparable
  - Last year's circulation is up 3%; this year's circulation is up 4%
- Use percentages to make the numbers more meaningful
  - My community read 25% more books than last year vs. My community read 36,234 more books than last year
- It's more about the pattern than the raw numbers
  - How do the numbers change over time?
- The pattern requires consistency to see clearly
  - Count the same way every year

Excel Is Your Friend!

- Import data from your ILS into an Excel-compatible format (e.g., comma-separated value or CSV)
- Add columns
- Convert numbers to percentages
- Compare this year to previous years
- Prepare charts and graphs – a picture is worth 1,000 numbers



Collection Development Reports

1. Items That Haven't Circulated in the Last Year
2. Top Circulating Titles by Collection
3. Holds Purchase Alert
4. Collection Size / Circulation / Percentage of Circulation
5. Budget by Collection
6. Turnover Rate

Low Circulation

WHICH TITLES AREN'T GOING OUT ANYMORE?

Low Circulation

- Run a report which lists titles that have circulated fewer than (0, 1, 2, etc.) times in the past year (or 2, 3, etc. years)
  - If the report is too long, increase the number of times circulated (e.g., 0 times will be a longer report than 5 times) or the number of years since it last circulated
- Include only those titles that were added more than a year ago
- Exclude non-circulating collections like Reference, Genealogy or collections you weed regularly like Periodicals
- Withdraw low-circulating titles from your collection
- Look for patterns
  - Are there types of titles (e.g., subject matter, genre, format) that are tending not to circulate?

Titles that Haven't Circ'd (Destiny)

36.	That Calahan Spunk!.	Ames, Francis H.	WES AME	0
37.	The Bald Hills.	Andrews, A. A.	WES AND	0
38.	The Blind Assassin.	Atwood, Margaret	AF ATW	0
39.	The Callahans' gamble	Ames, Francis H.	WES AME	0
40.	The Dinosaurs' Last Days.	Granowsky, Alvin	JF GRA	0
41.	The Golden Age of Sailing.	Collier, William	797 COL	0
42.	The Great House of God.	Lucado, Max	226 LUC	0
43.	The Human Side of Cancer.	Holland, Jimmie C, M.D.	616 HOL	0
44.	The Journal of Augustus Pelletier : The Lewis and Clark Expedition.	Lasky, Kathryn	JF LAS	0
45.	The Little Hands Art Book : Exploring Arts & Crafts with 2-to-6-Year-Olds.	Press, Judy	JNF 745 PRE	0
46.	The Night Riders.	Ballard, Todhunter	WES BAL	0
47.	Thunder from Jerusalem.	Thoene, Bodie & Brock	CHF THO	0
48.	Track of the Giant.	Baker, Will	WES BAK	0
49.	Trail of secrets	Goudge, Eileen.	AF GOU	0
50.	United States Coins 58th Edition 2001.	Yeoman, R.S.	332 YEO	0

Show the bottom 50 **titles**

Update

For the past 1 Years

☑ Include circulations from in-library use

Material type - All Material Types -

Call numbers to

High Circulation

WHAT TYPES OF TITLES GET CHECKED OUT MOST OFTEN IN EACH COLLECTION?

High Circulation

- Run a report which lists titles that have circulated the most times in the past year (or 2, 3, etc. years)
- Run the report by collection so that you can see the highest circulating titles in each area
- Consider purchasing multiple copies of high-circulating titles (especially in conjunction with the Holds report)
- Look for patterns
  - Are there types of titles (e.g., subject matter, genre, format) that tending to circulate better?

Top Titles (Destiny)

Top Title Statistics [Customize View]

Printable

	Title	Author	Call #	Circulations
1.	A thousand splendid suns	Hosseini, Khaled.	AF HOS	38
2.	The confession	Grisham, John.	Af GRI	29
3.	Lost empire	Cussler, Clive.	AF CUS	24
4.	The help	Stockett, Kathryn.	AF STO	23
5.	Spider bones	Reichs, Kathy.	AF REI	23
6.	These things hidden	Gudenkauf, Heather.	AF GUD	23
7.	The girl with the dragon tattoo	Larsson, Stieg, 1954-2004.	AF LAR	21
8.	Tough customer	Brown, Sandra, 1948-	AF BRO	21
9.	Never wave goodbye : a novel of suspense	Magee, Doug, 1947-	AF MAG	20
10.	The search	Roberts, Nora.	AF ROB	20

Show the top 50 **titles**

For the past 1 Years

☑ Include circulations from in-library use

Material type Book (monograph)

Call numbers AF AAA **to** AF ZZZ

Holds Purchase Alert

HOW MANY PEOPLE ARE WAITING TO CHECK OUT AN ITEM? SHOULD YOU BUY ADDITIONAL COPIES TO SHORTEN THE WAIT?

Holds Purchase Alert

- Run a report that lists titles with more than (5, 10, etc.) holds
- Consider your loan period
  - A title that circs for 2 weeks can take 2.5 months to get to the 5th user
- Buy multiple copies to meet the demand
- It's better to buy 2 (or more) copies of a title that will circulate than to take a chance on a title that may not get checked out

Hold Alert (Destiny)

Hold Alert (Sirsi)

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                    Purchase Alert based on Holds

                 Produced Friday, June 3, 2011 at 6:38 AM

1996   Title: A game of thrones / George R.R. Martin.
  Personal Author: Martin, George R. R.
           holds:8     copies:2     copies on order:0

2002   Title: A confederacy of dunces / John Kennedy Toole ;
                     foreword by Walker Percy.
  Personal Author: Toole, John Kennedy, 1937-1969.
           holds:7     copies:7     copies on order:0

2004   Title: Something borrowed / Emily Giffin.
  Personal Author: Giffin, Emily.
           holds:18    copies:2     copies on order:0

2005   Title: The glass castle : a memoir / Jeannette Walls.
  Personal Author: Walls, Jeannette.
           holds:6     copies:2     copies on order:0

2006   Title: Water for elephants [CD book]  / Sara Gruen.
  Personal Author: Gruen, Sara.
           holds:7     copies:2     copies on order:0

2005   Title: The glass castle [CD book] / by Jeannette Walls.
  Personal Author: Walls, Jeannette.
           holds:7     copies:1     copies on order:0
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Collection Size / Circulation / Percentage of Circulation

WHICH COLLECTIONS CIRCULATE THE MOST?

ARE THE HIGHEST CIRCULATING COLLECTIONS THE BIGGEST COLLECTIONS?

Item Count by Collection report

	A	B	C	D	E	F
1	Collection	Collection Category	Age Category	Items	Collection Category Subtotal	Age Category Subtotal
2	Adult Audiobook Cassette	Audio	Adult	184		
3	Adult Audiobook CD	Audio	Adult	604		
4	Adult Biography	Books	Adult	743		
5	Adult Compact Disc	Audio	Adult	1018		
6	Adult DVD	Video	Adult	1685		
7	Adult Fiction	Books	Adult	6602		
8	Adult Large Print	Books	Adult	2326		
9	Adult Mystery	Books	Adult	1604		
10	Adult NonFiction	Books	Adult	8674		
11	Adult Paperback Fiction	Books	Adult	199		
12	Adult Paperback Mystery	Books	Adult	132		
13	Adult Paperback Romance	Books	Adult	261		
14	Adult Paperback Science Fic	Books	Adult	26		
15	Adult Paperback Western	Books	Adult	8		
16	Adult Periodicals	Periodicals	Adult	2204		
17	Adult Reference	Books	Adult	146		
18	Adult Science Fiction	Books	Adult	565		
19	Adult Spanish	Books	Adult	776		
20	Adult Video	Video	Adult	462		
21	Adult Western	Books	Adult	502		
22	Art Print	Other Library Material	Adult	138		
23	Easy	Books	Child	3009		
24	Easy Readers	Books	Child	422		
25	Equipment	Other Library Material	Adult	14	3690	
26	Family DVD	Video	Adult	3		32,307
27	Iowa	Books	Adult	558		
28	Juvenile Audiobook Cassette	Audio	Child	14		

Total Volumes by Collection

Item Circulation by Collection

	A	B	C	D	E	F
1	**Collection**	**Circulation Category**	**Age Category**	**Total Checkouts and Renewals**	**Circ by Category**	**Circ by Age**
3	Adult Audiobook Cassette	Audio Recordings	Adult	14		
4	Adult Audiobook CD	Audio Recordings	Adult	112		
5	Adult Biography	Adult Books	Adult	45		
6	Adult Compact Disc	Audio Recordings	Adult	341		
7	Adult DVD	Video Recordings	Adult	1,610		
8	Adult Fiction	Adult Books	Adult	746		
9	Adult Large Print	Adult Books	Adult	285		
10	Adult Mystery	Adult Books	Adult	285		
11	Adult NonFiction	Adult Books	Adult	641		
12	Adult Paperback Fiction	Adult Books	Adult	35		
13	Adult Paperback Mystery	Adult Books	Adult	13		
14	Adult Paperback Romance	Adult Books	Adult	58		
15	Adult Paperback Science Fiction	Adult Books	Adult	1		
16	Adult Paperback Western	Adult Books	Adult	0		
17	Adult Periodicals	Periodicals	Adult	123		
18	Adult Reference	Adult Books	Adult	0		
19	Adult Science Fiction	Adult Books	Adult	34		
20	Adult Spanish	Adult Books	Adult	103		
21	Adult Video	Video Recordings	Adult	79		
22	Adult Western	Adult Books	Adult	15		
23	Art Print	All Other Items	Adult	18		
26	Easy	Children's Books	Child	542		
27	Easy Readers	Children's Books	Child	49		
29	Family DVD	Video Recordings	Adult	5		5,167
31	Iowa	Adult Books	Adult	18		
32	Juvenile Audiobook Cassette	Audio Recordings	Child	2		

Item Circulation by Collection.

Collection Size vs. Circulation

- Run a report to determine total circulation by collection for the previous year
- In Excel, write a formula to determine % of circulation
  - (=K2/K44 where K44 is the total circ)
- Run a report to determine how many volumes are in each collection
- In Excel, write a formula to determine % of circulation
  - (=D2/D44 where D44 is the total circ)
- Compare % of circ vs. % of collection
  - If the circ is bigger than the %, maybe buy more
  - If the circ is smaller than the %, maybe buy less

Comparison of Items vs. Circulation

	A	D	I	J	K
1	Collection	Items	% of Collection	Circulation	% of Circulation
2	Adult Audiobook Cassette	184	0.42%	228	0.23%
3	Adult Audiobook CD	604	1.36%	1608	1.65%
4	Adult Biography	743	1.68%	444	0.46%
5	Adult Compact Disc	1018	2.30%	3216	3.31%
6	Adult DVD	1685	3.80%	25236	25.97%
7	Adult Fiction	6602	14.90%	11016	11.34%
8	Adult Large Print	2326	5.25%	3720	3.83%
9	Adult Mystery	1604	3.62%	3624	3.73%
10	Adult NonFiction	8674	19.57%	7260	7.47%
11	Adult Paperback Fiction	199	0.45%	432	0.44%
12	Adult Paperback Mystery	132	0.30%	96	0.10%
13	Adult Paperback Romance	261	0.59%	684	0.70%
14	Adult Paperback Science Fic	26	0.06%	36	0.04%
15	Adult Paperback Western	8	0.02%	0	0.00%
16	Adult Periodicals	2204	4.97%	2244	2.31%
17	Adult Reference	146	0.33%	0	0.00%
18	Adult Science Fiction	565	1.27%	396	0.41%
19	Adult Spanish	776	1.75%	1128	1.16%
20	Adult Video	462	1.04%	924	0.95%
21	Adult Western	502	1.13%	372	0.38%
22	Art Print	138	0.31%	432	0.44%
23	Easy	3009	6.79%	5040	5.19%
24	Easy Readers	422	0.95%	1032	1.06%
25	Equipment	14	0.03%	36	0.04%
26	Family DVD	3	0.01%	84	0.09%
27	Iowa	558	1.26%	264	0.27%
28	Juvenile Audiobook Cassette	14	0.03%	0	0.00%

Budget By Collection

WHICH COLLECTIONS CIRCULATE THE MOST?

ARE THE HIGHEST CIRCULATING COLLECTIONS THE BIGGEST COLLECTIONS?

Collection Use vs. Budget

- Add another column for $ Spent in previous FY
- Write a formula for % of the budget
  - (=F2/E14 where E14 is the total budget)
- Compare % of budget to % of Circulation and % of Collection
  - How can these three numbers be brought into better alignment?
  - Are you spending too much money on a collection that doesn't appeal to your users?

Budget By Collection

A	B	C	D	E	F	G	H	I	J
Item Type	**Subcategory**	**$ Allocated FY2012**	**% Budget**	**$ Spent FY2011**	**% Spent**	**Circulations**	**% Circulation**	**Item Count**	**% Collection**
Adult Audiobooks		$1,200	3%	$1,074	3%	2,101	3%	878	2%
Adult Books		$12,800	32%	$15,040	42%	25,180	30%	20,474	49%
Adult Books	Paperbacks	$400	1%	$358	1%	1,382	2%	535	1%
Adult Books	Spanish	$400	1%	$716	2%	1,170	1%	725	2%
Adult Books	Young Adult	$2,000	5%	$1,791	5%	4,328	5%	1,261	3%
Adult Music		$1,200	3%	$1,074	3%	2,931	4%	869	2%
Adult Video		$8,000	20%	$6,088	17%	19,587	23%	2,383	6%
Art Prints		$0	0%	$0	0%	323	0%	153	0%
Juvenile Audiobooks		$800	2%	$358	1%	231	0%	161	0%
Juvenile Books		$10,000	25%	$7,878	22%	21,311	26%	13,697	33%
Juvenile Music		$1,200	3%	$358	1%	680	1%	143	0%
Juvenile Video		$2,000	5%	$1,074	3%	4,325	5%	664	2%
		$40,000	100%	$35,810	100%	83,549	100%	41,943	100%

Turnover Rate

HOW MANY TIMES, ON AVERAGE, DOES AN ITEM GET CHECKED OUT IN EACH COLLECTION?

Turnover Rate

- The more times a title is checked out, the better the bargain
  - A title that costs $20 and goes out 5 times cost $4 per use
  - A title that costs $20 and goes out 40 times cost $.50 per use
- How do you make a turnover report?
  - Circulation for the collection / Total circulation x 100 (%)
  -

Turnover Report Parameters (Destiny)

Library Reports > Collection Statistics - Historical

Library
Patron
Report Builder
Report Manager

How do I...

Create New Report | Saved Reports

List collection statistics...

Circulations From 7/1/2010 to 6/30/2011

Show Summary Only

Organized by Call Number Prefix

Call Numbers From to

To specify a call number range, enter at least the first 3 digits of each Dewey number or a complete call number prefix.

Increment by Dewey 100s

Circulation Types All Circulation Types Update

Output as Microsoft Excel

Save Setup | Run Report

Turnover Report (Destiny)

	A	B	C
1	Range	Circulations	Percent
2	000 - 099	77	0.17%
3	100 - 199	66	0.14%
4	200 - 299	120	0.26%
5	300 - 399	439	0.94%
6	400 - 499	20	0.04%
7	500 - 599	50	0.11%
8	600 - 699	1,110	2.38%
9	700 - 799	366	0.79%
10	800 - 899	129	0.28%
11	900 - 999	435	0.93%
12	AF	6,626	14.23%
13	BIO	76	0.16%
14	CAS	203	0.44%
15	CD	528	1.13%
16	CHF	1,528	3.28%
17	CHR	51	0.11%
18	DVD	1,076	2.31%
19	ESP	33	0.07%
20	EZ	1,707	3.67%
21	HOL	236	0.51%
22	JA	1	0.00%
23	JBIO	228	0.49%
24	JCAS	48	0.10%
25	JDISC	76	0.16%
26	JES	392	0.84%
27	JF	11,033	23.69%
28	JHOL	298	0.64%
29	JNF	3,539	7.60%
30	JPB	1,339	2.87%

Collection Circulation Report

Turnover Report (Polaris)

Turnover Rate by Collection

For the period: 7/1/2010 to 6/30/2011

Perry Public Library

Collection	Items	Circ count	Turnover
Adult Audiobook Cassette	184	212	1.15217
Adult Audiobook CD	604	1563	2.58775
Adult Biography	743	528	0.71063
Adult Compact Disc	1018	3781	3.71415
Adult DVD	1685	21088	12.51513
Adult Fiction	6602	9398	1.42351
Adult Large Print	2326	3684	1.58383
Adult Mystery	1604	3382	2.10848
Adult NonFiction	8674	7430	0.85658
Adult Paperback Fiction	199	509	2.55779
Adult Paperback Mystery	132	130	0.98485
Adult Paperback Romance	261	623	2.38697
Adult Paperback Science Fiction	26	33	1.26923
Adult Paperback Western	8	4	0.50000
Adult Periodicals	2204	1683	0.76361
Adult Reference	146	5	0.03425
Adult Science Fiction	565	470	0.83186

Learn More

- Arizona State Library Collection Development Training (http://www.lib.az.us/cdt/)
- Iowa Library Services Policy Samples (http://www.statelibraryofiowa.org/ld/k-p/Policies)
- Iowa Library Services Catalog – Materials on Collection Development that you can borrow through ILL (http://tinyurl.com/3pfx3vq)