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Aligning Our Books to Our Patrons

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Aligning our Books to our Patrons

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9 November 2017, Charleston SC

Our (longitudinal) project

- How can we assess what we are **not** doing in terms of collection development?
- What can we learn from consortium (and ILL) borrowing data to create a deeper more browse-able collection?
 - What is a “normal” or “acceptable” level of borrowing?
 - What improvements can we make to our autoship/ approval profile?
 - Should we coordinate our collection development?
 - And will this be whack-a-mole?
- How can we measure the impact of these changes on the meta-collection for our consortium?

About our institutions

- Three small Jesuit universities in urban parts of California
- Similarities allow for potential comparison

	SCU	USF	LMU
Undergraduates	5,438	6,745	6,126
Graduate students	2,984	3,667	2,061
Full-time faculty	556	505	561
Part-time faculty	360	688	581
Bound volumes (without law libraries)	~893,000	~875,000	~675,000

About LINK+

- Large consortium (LINK+) of academic & public libraries with unmediated, patron-initiated borrowing
- No coordination of collection development
 - Not really feasible given the mix of libraries & library types
- Very diverse metacollection

	SCU	USF	LMU	All 65
Titles contributed	733,792	794,700	673,873	8.5M
Unique titles held	117,869	192,844	114,642	4.5M
% solely held of own titles	16.1%	24.2%	17.0%	52.9%

Our patrons & LINK+

- >90% of our total “ILL” traffic for books is via LINK+
- Patrons organically discover that LINK+ exists and make use of it, including undergraduates

SCU patron type	Local transactions	Non-local transactions
Undergraduates	18.8%	28.1%
Graduate students	6.6%	8.0%
Law students	8.7%	10.9%
All student types	34.1%	47.0%

Our methodology

- Within a call number range, we examined for each of us:
 - How many **titles were bought** in the last five years (as a proxy for our current level of investment)
 - Are those books **circulating** at all (as a proxy for our successfully meeting (some of) the demand)
 - The level of our **LINK+ borrowing** (as a proxy for unmet demand)
- Compare unmet demand to total demand (circ & LINK+)
- Compare the performance of the three peer institutions for 2013 to the present

Year 1 : SCU & USF

- USF's collection was performing significantly better
- SCU looked at how to improve matters
 - If the local collection is performing well but there is still a lot of unmet demand, consider buying **more** (e.g. religion)
 - If the local collection is not performing well and there is a lot of unmet demand, consider buying **differently** (e.g. arts)
 - Purchased both exact titles and titles in selected subject areas to address clear gaps
 - Made dozens of incremental changes to our approval & autoship profiles
- Next: Add LMU to better understand “normal”

Year 2 : Folding in LMU

- LMU/USF collections performing well, with LMU performing better than USF
- We have radically different levels of investment in books
 - SCU: should we reallocate our budget to buy more books and fewer databases / journals? (labor & money issues here)
 - LMU: looking at ROI for some subjects where we may be overinvesting
- Next: consider identifying areas where we could each commit to developing differently deeper collections

Year 3

- All three continued to purchase materials based on this data
- SCU received a mid-year budget cut such that we didn't have the opportunity to address our questions about budget structure
 - SCU still allocated some funds toward this project, though!
- The LINK+ consortium received news about membership composition, giving us new concerns

Consortium changes (2017)

- **Farewell** to Cal Poly Pomona, Cal Poly San Luis Obispo, California Maritime Academy, CSU East Bay, CSU Fresno, CSU Stanislaus, SFSU, SJSU, Sonoma State
- **Welcome** to San Joaquin Delta College, Amador County Library, Lodi Public Library, Stanislaus County Library, Calaveras County Library, SPLASH (Benicia Public, Dixon Public, Solano County, and St. Helena Public libraries), City College of San Francisco, University of the Pacific
- CSU Long Beach is on a six-month hiatus
- We anticipate that UNLV will also depart

Consortium changes (2015-17)

- Membership (65 to 68) and diversity of membership affected
 - 2017: Nine CSU campuses withdraw
 - Loss of 1.9 million unique bibs (37% of 2015 metaholdings)
 - 2015: Claremont Colleges withdraw
 - Loss of 709k unique bibs lost (13.7% of 2015 metaholdings)
- Our unique holdings have gone up, as other libraries who held our titles have withdrawn
- Have purchasing efforts from the last two years made the meta-collection more resilient to the departures?

Our roles in the consortium have changed proportionally

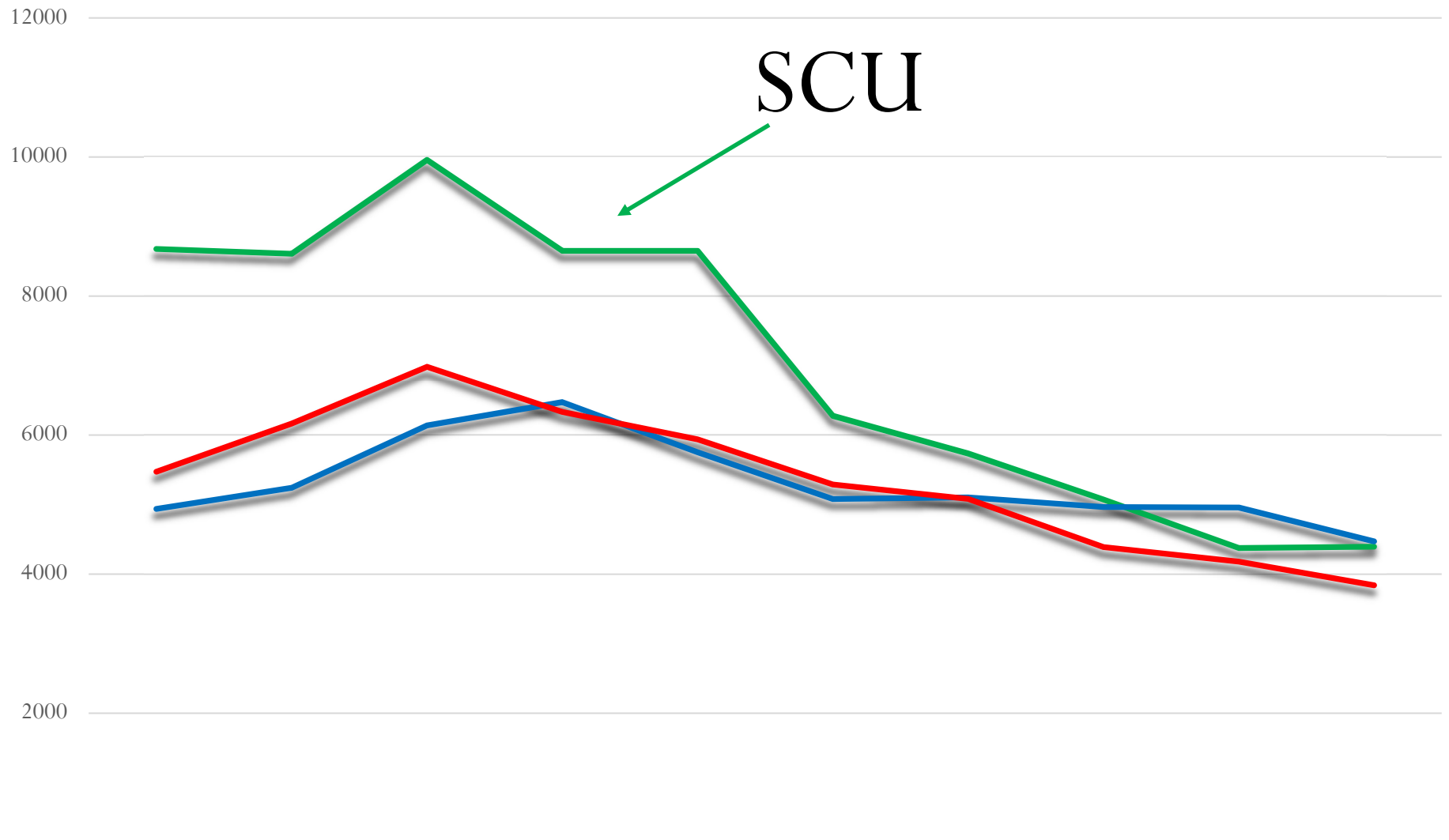
Summer 2015	SCU	USF	LMU	All 65
Titles contributed	733,792	794,700	673,873	8.5M
Unique titles held	117,869	192,844	114,642	4.5M
% solely held of own titles	16.1%	24.2%	17.0%	52.9%

Summer 2017	SCU	USF	LMU	All 68
Titles contributed	723,773	730,244	696,272	6.8M
Unique titles held	155,910	216,949	183,177	3.6M
% solely held of own titles	21.5%	29.7%	26.3%	53.0%

How do we know what we lost?

- Loss of unique bibs don't paint a full picture
 - How many bibs had zero LINK+ transactions? Unknown
- CSU campuses were supplying lots of materials
 - Load balancing algorithm may mean they were supplying materials held elsewhere
- Most LINK+ transactions are unique and (we assume) don't justify a purchase for our local collections
 - Most undergraduates do not use ILLiad for returnables, so we have simply lost access to these titles for that population
 - Undergraduates may (?) simply use what they do find instead

Number of LINK+ borrowing transactions per year

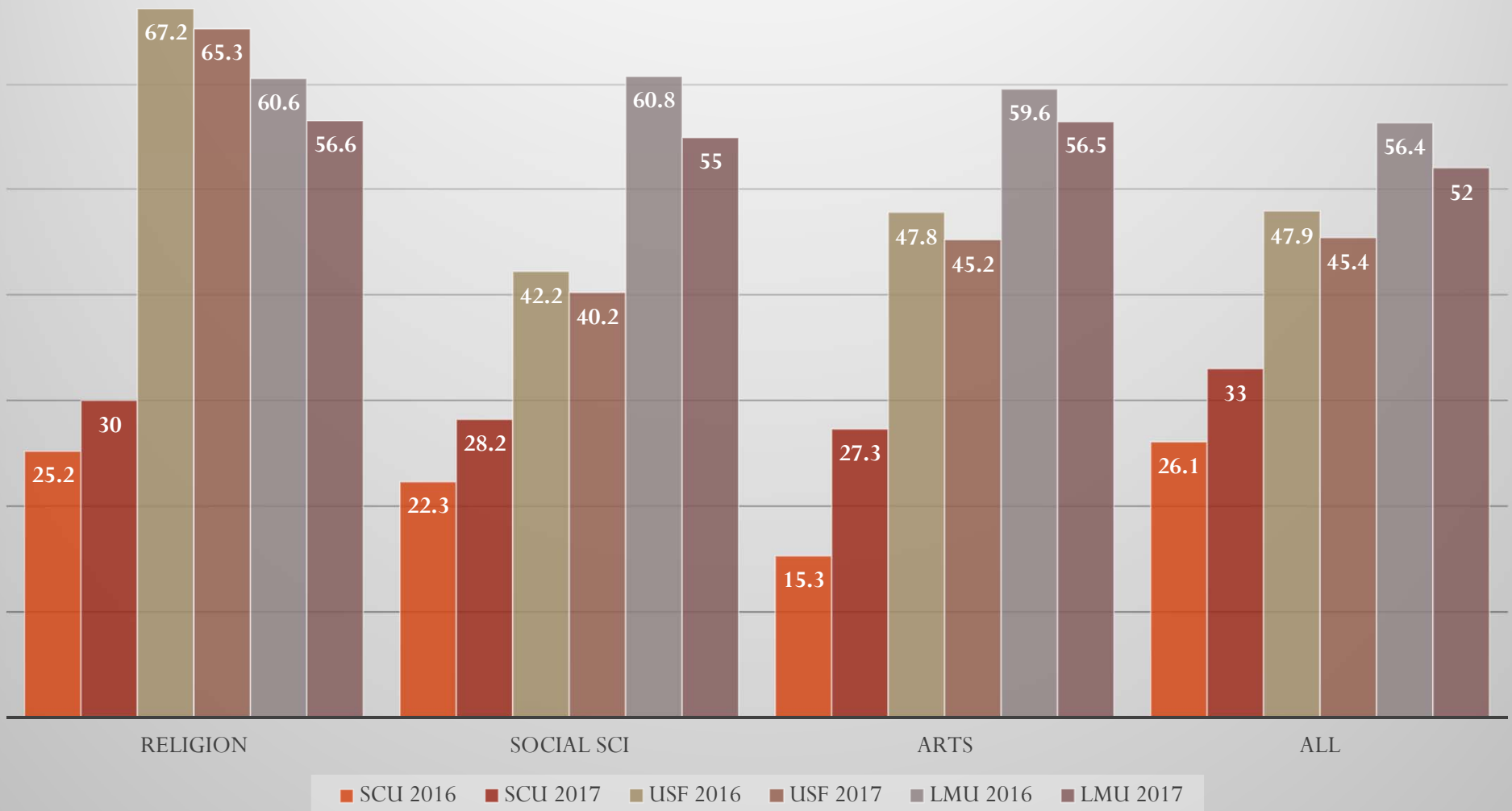


	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
SCU	8678	8609	9958	8651	8651	6276	5735	5072	4376	4394
LMU	4938	5242	6138	6474	5753	5080	5104	4966	4958	4471
USF	5473	6166	6982	6334	5938	5290	5082	4389	4179	3840

— SCU — LMU — USF

January 2013-August 2017	BL-BX religion	H, HM-HX social sciences	N arts	All
SCU bought	1,895	1,162	1,122	21,423
SCU circulated	961	589	408	10,131
SCU borrowed	2,239	1,498	1,088	20,515
SCU [met : total demand]	30.0 (25.2)	28.2 (22.3)	27.3 (15.3)	33.0 (26.1)
USF bought	3,394	1,661	1,943	27,316
USF circulated	2,036	1,043	1,282	15,439
USF borrowed	1,084	1,555	1,552	18,561
USF [met : total demand]	65.3 (67.2)	40.2 (42.2)	45.2 (47.8)	45.4 (47.9)
LMU bought	6,758	4,733	3,505	63,780
LMU circulated	3,237	1,999	1,065	24,310
LMU borrowed	2,482	1,392	771	21,026
LMU [met : total demand]	56.6 (60.6)	55.0 (60.8)	56.5 (59.6)	52.0 (56.4)

Ratio of Satisfaction: What percentage of transactions were satisfied by our local collections?



Purchases from this project

		Budget	Titles added	Titles circulated	% circulated
SCU	2014-2015	\$40,000	1,194	531	44.5%
	2015-2016	\$40,000	1,052	405	38.4%
	2016-2017	\$20,100	325	89	27.3%
	2017-2018	\$6,500	92 so far	11	11.9%
USF	2016-2017	\$10,800	183	80	43.7%
	2017-2018	\$2,000	52 so far	15	28.9%
LMU	2016-2017	\$6,500	122	41	33.6%
	2017-2018	\$18,000	361 so far	30	8.3%

Conclusions to date

- We were able to **identify** where we had problems and try to address them
- Return on investment of books purchased through this project is significant
- SCU's ratio of satisfaction is already on a significant upward trend after only a few years
- SCU's borrowing through LINK+ has dropped dramatically since introducing several changes in 2014-2015
 - DDA for ebooks
 - Targeted purchases from this project
 - Targeted changes to our approval profile from this project

Future goals & measurement

- Transactional data shows the lending agency, so we could consider titles no longer in the metacollection as targeted purchases
 - SCU had already been doing this with material previously borrowed Claremont Colleges
- Look more deeply at targeted call number areas
- Consider differentiating our approval plans
- Participate in recruitment efforts for LINK+ membership

Questions & discussion

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