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Evaluating Use of Purchased Books Using Circulation Information

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Evaluating Use of Purchased Books Using Circulation Information

Kathleen Hughes

Montclair State University

Montclair, NJ

Symphony

JUNE 13-15, 2011 ♦ LANCASTER,
PENNSYLVANIA

The logo for the Society for the Study of Narrative Research (SNRG) is displayed in the bottom right corner. It consists of the letters 'SNRG' in a bold, blue, sans-serif font with a white outline.

The Players

- VALE Cooperative
Collection Management
Committee

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The logo for SNRG, consisting of the letters S, N, R, and G in a bold, blue, sans-serif font. The letters are slightly shadowed and have a slight 3D effect.

The Problem

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Develop & test a
method for finding out
if individual libraries
are getting “the most
bang for their buck”

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The Solution

A Pilot Study!!!

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Project Purpose:

- To determine circulation of recently purchased material and analyze its use
- To help assess collection development policies and practices regarding book selection, approval plans
- To help identify trends, strengths and weaknesses in the collection, and to consider ameliorative strategies

Project Purpose (Cont'd):

- To help determine the best use of material budget allocations
- To determine/identify a circulation/acquisition ratio

From: VALE CCM Meeting Agenda, Dec. 6, 2010

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Pilot Project Participants:

- Montclair State University
- Rutgers University
- William Paterson University

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The logo for SNRG (State Network for Research and Graduate Education) is displayed in the bottom right corner. It consists of the letters 'SNRG' in a bold, blue, sans-serif font with a slight 3D effect and a shadow.

Parameters

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What to count?

- Books only. Print only
 - Media and ebooks would be a separate report
- Purchased only (not added – such as gifts).
 - Define how you identify purchased items.
- Circulating only (not Reference or Special Collections, or any other non-circulating book collection)

What to count? (Cont'd)

- Approval programs and firm orders.
- Faculty and Librarian selected.
- Include ILL, Reserves, in house use (anything that is counted in ILS circulation)

From: VALE CCM Meeting Agenda, Dec. 6, 2010

Time Frames to Use

- Fiscal year July 1 to June 30
- When purchased: Begin with FY 2005.
 - Eventually will collect 5 years of data
- When received.
 - Define how you identify received items (Barcode attached, Item create date, etc.)
- Begin circulation – WHEN?

From: VALE CCM Meeting Agenda, Dec. 6, 2010

Reporting

- Call number ranges by LC classifications.
One letter or two letters as needed.
- Use Template to record date

From: VALE CCM Meeting Agenda, Dec. 6, 2010

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Template

| TEMPLATE: VALE CIRCULATION OF RECENTLY PURCHASED PRINT BOOKS | | | | | | | | |
|--|------------------|---------------|--------------------|------------|---------------------|--------------|---------------------------------|------------------------|
| LIBRARY: WILLIAM PATERSON UNIVERSITY | | | | | | | | |
| FISCAL YEAR: July 1, 2004 - June 30, 2005 | | | | | | | | |
| LC # RANGE | TITLES PURCHASED | TITLES CIRC'D | % OF TITLES CIRC'D | # OF CIRCS | TITLES NEVER CIRC'D | % NOT CIRC'D | AVG CHECK-OUTS PER TITLE CIRC'D | AVG CIRC OF COLLECTION |
| B | 111 | 40 | 36% | 67 | 71 | 64% | 1.68 | 0.60 |
| BF | 206 | 116 | 56% | 249 | 90 | 44% | 2.15 | 1.21 |
| LB | 286 | 156 | 55% | 314 | 130 | 45% | 2.01 | 1.10 |

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Step 1

Determine LC
Classification
Breakdowns

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| | | |
|--|--------------------------|-------------------------------------|
| A-AZ (Gen'l Works) | J (Poli Sci) | PT(German & Scan Lit) |
| B-BD (Philosophy) | K (Law) | Q (Math & Physical Sciences) |
| BF (Psychology) | L (Education) | QH-QR (Life Sciences) |
| BH-BJ (Philosophy cont'd)) | M (Music Scores) | R (Medicine) |
| BL-BX (Religions) | ML-MT (Music Lit/Theory) | S (Agriculture) |
| C-F (History) | N-NX (Art) | T (Technology/Photo/Home Economics) |
| G-GB (Geography/Maps) | P (Philology) | U-V (Military Science) |
| GC-GE (Oceanography/Enviro Science) | PA-PD (Greek, etc.) | Z (Biblio. Lib Sci, Info Resources) |
| GF,GN,GR,GT (Anthro/Folklore/Customs) | PE (English) | Juvenile Collection |
| GV (Recreation/Leisure) | PF-PM (Germanic, etc.) | |
| H-HA (Soc Sci/Stats) | PN (Lit - Gen'l) | |
| HB-HJ (Econ, Finance) | PQ (Romance Lang Lit) | |
| HF5001-6201 (Business) | PR (English) | |
| HM-HX (Sociology/Socialism) | PS (American) | |

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Step 2

Create report templates in Workflows

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Report Template Used:

Count Item Titles

(TITLECNT REPORT) to count the titles added during a fiscal year & which have circulated

Selection Criteria:

Count Items Added

- **Callnum Selection Criteria**
 - Call Number Range : greater than a1 and less than az9999
 - Class Scheme : contain LC
- **Item Selection Criteria**
 - Home Location : contain STACKS
 - Date Created : after 6/30/2005 and before 7/1/2006
 - Category 2 : not contain GIFT,GOVDOX,MAML

Count Items Added That have Circ'd

- **Callnum Selection Criteria**
 - Call Number Range : greater than a1 and less than az9999
 - Class Scheme : contain LC
- **Item Selection Criteria**
 - Home Location : contain STACKS
 - Date Created : after 6/30/2005 and before 7/1/2006
 - # Total Charges : greater than 0
 - Category 2 : not contain GIFT,GOVDOX,MAML
 - Date Last Charged : before 12/31/2010

Step 3

Run the reports

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The logo for SNRG, consisting of the letters S, N, R, and G in a bold, blue, sans-serif font. The letters are slightly shadowed, giving them a 3D appearance as if they are floating above a surface.

July 1, 2004 - June 30, 2005

| LC # RANGE | Items PURCHASED | Items CIRC'D | % OF Items CIRC'D | NUMBER OF CIRCS | Items NEVER CIRC'D | % NOT CIRC'D | AVG CHECKOUTS PER Item CIRC'D | AVG CIRC OF COLLECTION |
|-------------|-----------------|--------------|-------------------|-----------------|--------------------|--------------|-------------------------------|------------------------|
| A | 16 | 11 | 68.75% | 41 | 5 | 31.25% | 3.73 | 2.56 |
| B-BD | 53 | 31 | 58.49% | 108 | 22 | 41.51% | 3.48 | 2.04 |
| BF* | 123 | 89 | 72.36% | 406 | 34 | 27.64% | 4.56 | 3.30 |
| BH-BJ | 17 | 13 | 76.47% | 43 | 4 | 23.53% | 3.31 | 2.53 |
| BL-BX | 162 | 110 | 67.90% | 381 | 52 | 32.10% | 3.46 | 2.35 |
| C-F | 754 | 471 | 62.47% | 1,718 | 283 | 37.53% | 3.65 | 2.28 |
| G-GB | 127 | 19 | 14.96% | 44 | 108 | 85.04% | 2.32 | 0.35 |
| GC-GE | 24 | 11 | 45.83% | 30 | 13 | 54.17% | 2.73 | 1.25 |
| GF,GN,GR,GT | 55 | 38 | 69.09% | 155 | 17 | 30.91% | 4.08 | 2.82 |

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TEMPLATE: VALE CIRCULATION OF RECENTLY PURCHASED PRINT BOOKS
 MONTCLAIR STATE
 LIBRARY: UNIVERSITY
 FISCAL YEAR: July 1, 2004 - June 30, 2005

| LC # RANGE | Items PURCHASED | Items CIRC'D | % OF Items CIRC'D | NUMBER OF CIRCS | Items NEVER CIRC'D | % NOT CIRC'D | AVG CHECKOUTS PER Item CIRC'D | AVG CIRC OF COLLECTION |
|--------------------------|-----------------|--------------|-------------------|-----------------|--------------------|--------------|-------------------------------|------------------------|
| A | 16 | 11 | 68.75% | 41 | 5 | 31.25% | 3.73 | 2.56 |
| B-BD | 53 | 31 | 58.49% | 108 | 22 | 41.51% | 3.48 | 2.04 |
| BF* | 123 | 89 | 72.36% | 406 | 34 | 27.64% | 4.56 | 3.30 |
| BH-BJ | 17 | 13 | 76.47% | 43 | 4 | 23.53% | 3.31 | 2.53 |
| BL-BX | 162 | 110 | 67.90% | 381 | 52 | 32.10% | 3.46 | 2.35 |
| C-F | 754 | 471 | 62.47% | 1,718 | 283 | 37.53% | 3.65 | 2.28 |
| G-GB | 127 | 19 | 14.96% | 44 | 108 | 85.04% | 2.32 | 0.35 |
| GC-GE | 24 | 11 | 45.83% | 30 | 13 | 54.17% | 2.73 | 1.25 |
| GF,GN,GR,GT | 55 | 38 | 69.09% | 155 | 17 | 30.91% | 4.08 | 2.82 |
| GV | 76 | 54 | 71.05% | 186 | 22 | 28.95% | 3.44 | 2.45 |
| H-HA | 5 | 2 | 40.00% | 11 | 3 | 60.00% | 5.50 | 2.20 |
| HB-HJ(excludes Business) | 279 | 178 | 63.80% | 529 | 101 | 36.20% | 2.97 | 1.90 |
| HF5001-6201* | 50 | 34 | 68.00% | 139 | 16 | 32.00% | 4.09 | 2.78 |
| HM-HX | 302 | 227 | 75.17% | 1,242 | 75 | 24.83% | 5.47 | 4.11 |
| J | 94 | 57 | 60.64% | 253 | 37 | 39.36% | 4.44 | 2.69 |
| K | 150 | 67 | 44.67% | 186 | 83 | 55.33% | 2.78 | 1.24 |
| L* | 306 | 217 | 70.92% | 988 | 89 | 29.08% | 4.55 | 3.23 |
| M | 146 | 37 | 25.34% | 91 | 109 | 74.66% | 2.46 | 0.62 |
| ML-MT | 188 | 114 | 60.64% | 485 | 74 | 39.36% | 4.25 | 2.58 |
| N-NX | 246 | 160 | 65.04% | 623 | 86 | 34.96% | 3.89 | 2.53 |



Challenges

- Tedious nature of editing the template & setting up reports
- Reports tie up server

Preliminary Results

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Best Performing FY05

% of Bought Items that Circulated (Avg=60.32%)

| Class Range | | % That Circ'd | Total Bought |
|-------------|---------------------|---------------|--------------|
| BH-BJ | Philosophy | 76.47% | 17 |
| HM-HX | Sociology/Socialism | 75.17% | 302 |
| Juvenile | | 73.42% | 79 |
| P | Philology | 72.73% | 33 |
| BF* | Psychology | 72.36% | 123 |
| GV | Recreation/Leisure | 71.05% | 76 |
| L* | Education | 70.92% | 306 |
| PA-PD | Greek, etc., Lit | 70.59% | 68 |
| PT | Germanic, etc., Lit | 70.59% | 17 |

* Approval Plan

#s of Circ, Average Checkouts ... (Avg Circ/item=3.89)

| Class Range | | Avg Checkouts per Item | Total Circ'd |
|-------------|---------------------|------------------------|--------------|
| H-HA | | 5.50 | 2 |
| HM-HX | Sociology/Socialism | 5.47 | 227 |
| R | Medicine | 5.21 | 112 |
| Juvenile | | 5.14 | 58 |
| QH-QR | | 4.68 | 73 |
| PA-PD | Greek, etc., Lit | 4.67 | 48 |
| BF* | Psychology | 4.56 | 89 |
| PT | Germanic, etc., Lit | 4.50 | 12 |

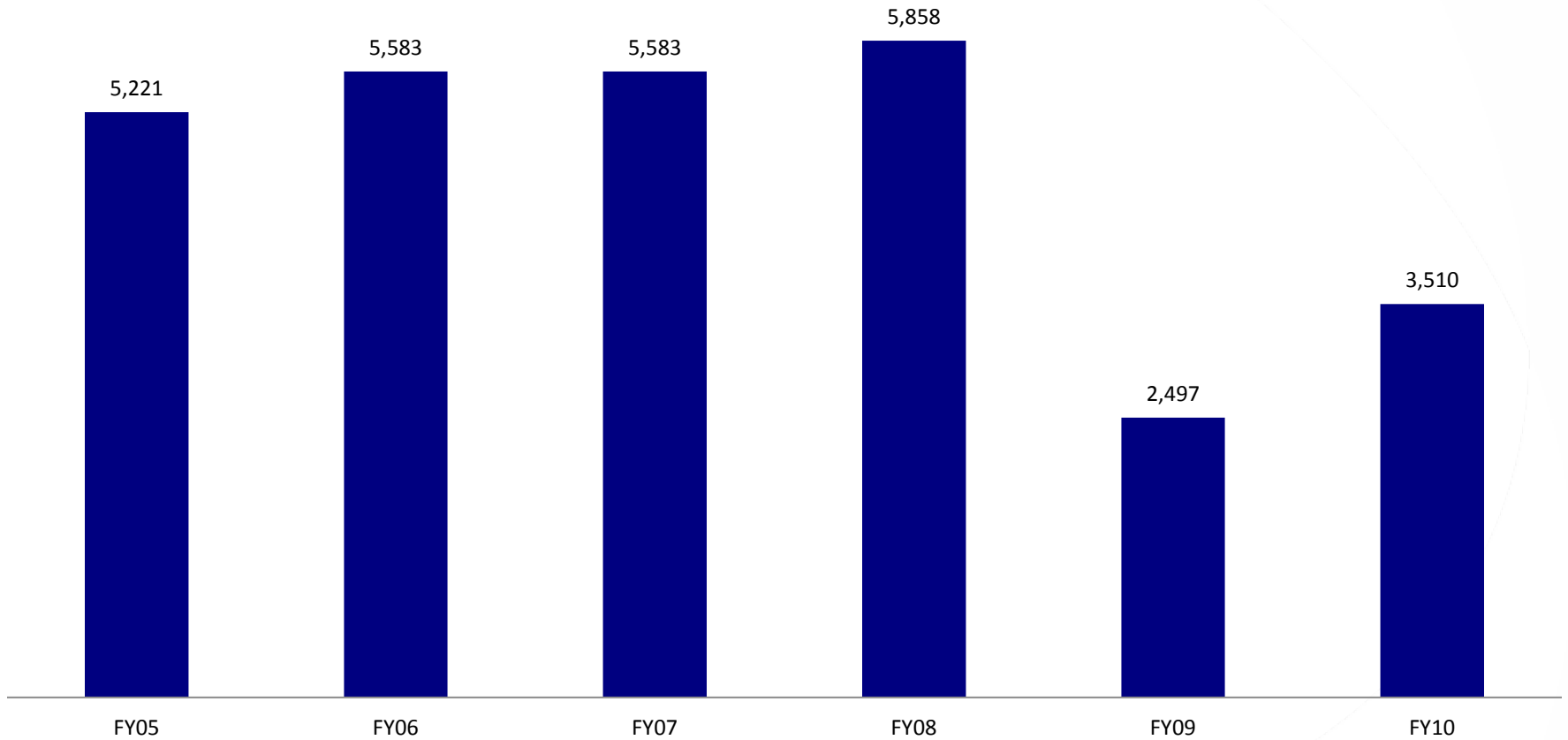
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Comparisons to Other Fiscal Years ...

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Total Purchased Circulating Books



FY05

FY06

FY07

FY08

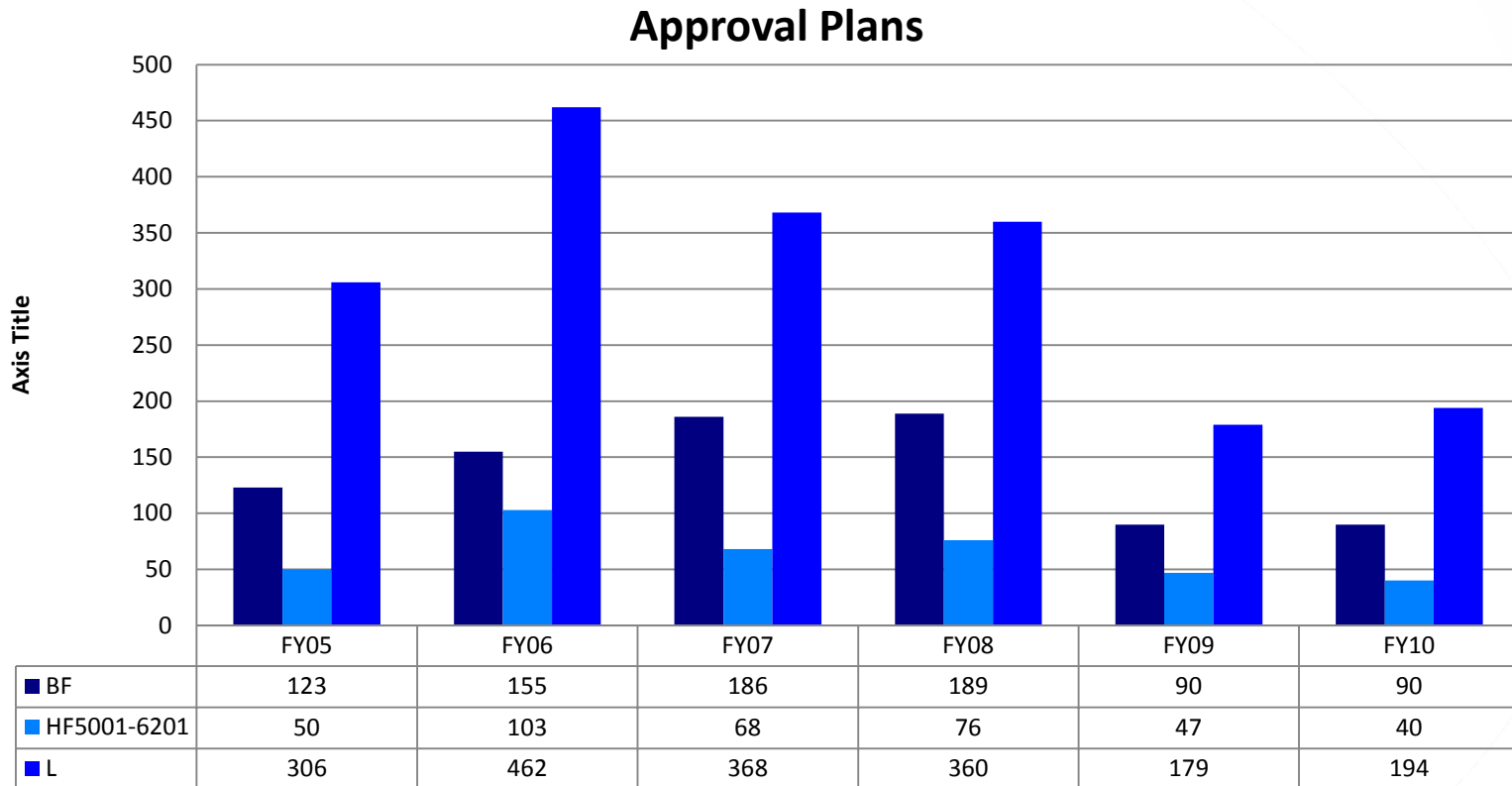
FY09

FY10

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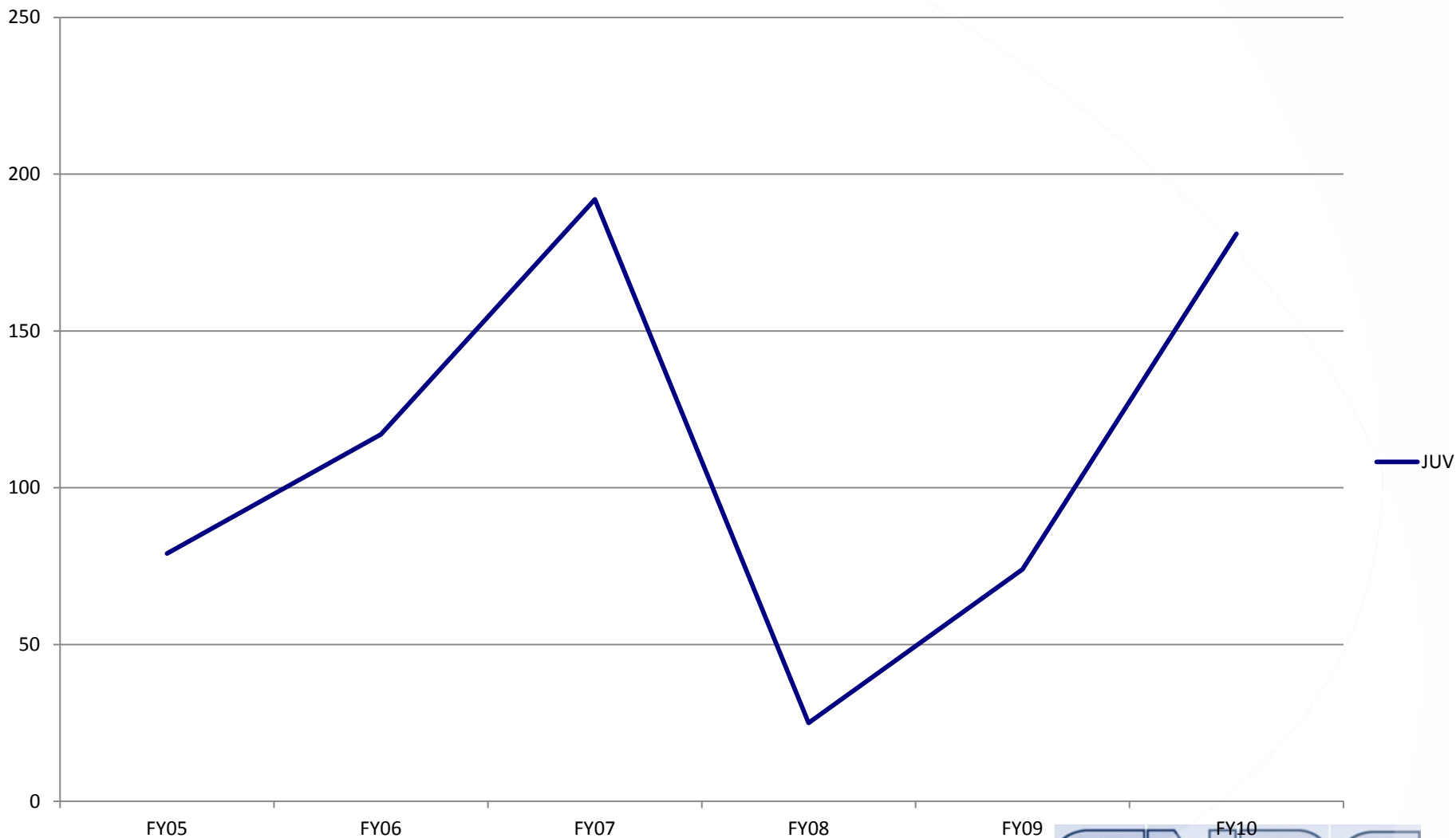
Totals Purchased ...



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Juvenile Collection Purchased

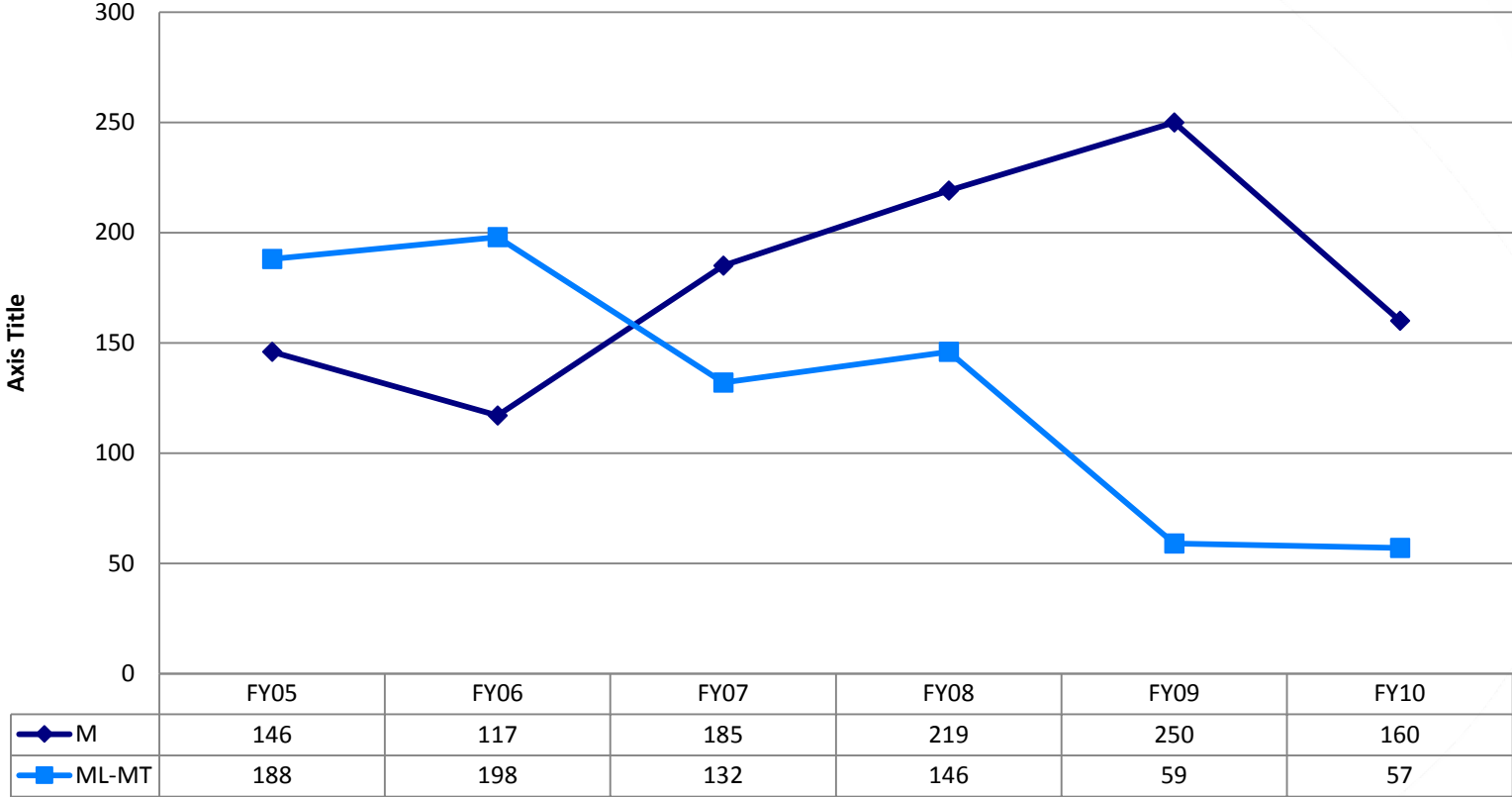


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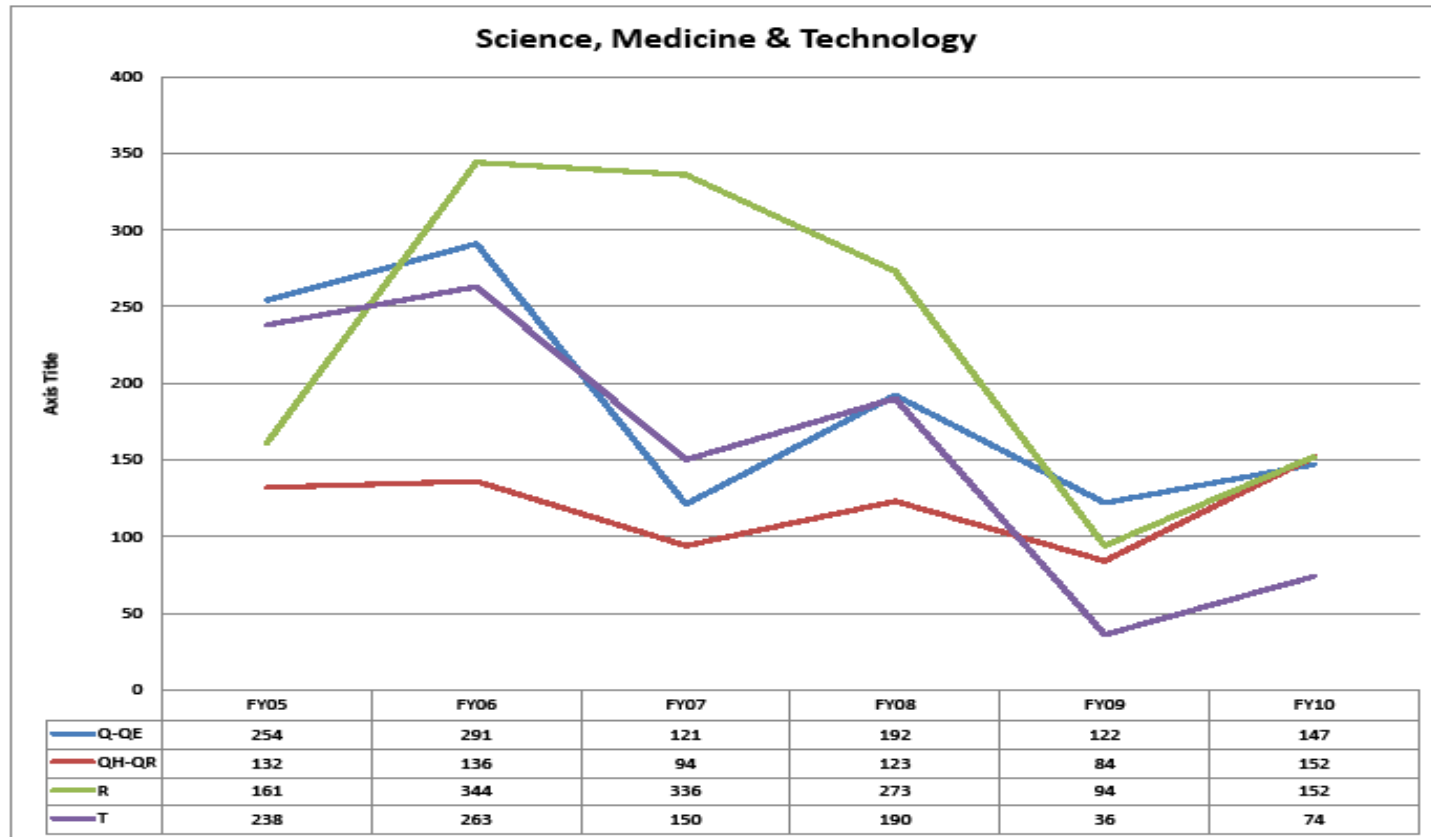


Scores & Books on Music Purchased

Music



Science Purchased



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Comparative Ranks Over 5 Fiscal Years

| RANK | 5 Years | | 4 Years | | 3 Years | | 2 years | | 1 years | |
|------|----------------|----------|----------------|----------|----------------|----------|----------------|----------|----------------|----------|
| | Class | % Circ'd | Class | % Circ'd | Class | % Circ'd | Class | % Circ'd | Class | % Circ'd |
| 1 | BH-BJ | 76.47% | BH-BJ | 70.59% | BH-BJ | 47.06% | HB-HJ (0 Bus.) | 35.84% | BH-BJ | 35.29% |
| 2 | HM-HX | 75.17% | L* | 56.21% | HB-HJ (0 Bus.) | 44.44% | BH-BJ | 35.29% | HB-HJ (0 Bus.) | 26.16% |
| 3 | JUV | 73.42% | GF-GT | 54.55% | A | 43.75% | HF5001-6201* | 34.00% | U-V | 25.00% |
| 4 | P | 72.73% | PN | 54.50% | PF-PM | 42.65% | BF* | 33.33% | HF5001-6201* | 22.00% |
| 5 | BF* | 72.36% | PE | 54.35% | BF* | 42.28% | PF-PM | 30.88% | BF* | 21.95% |
| 6 | GV | 71.05% | HF5001-6201* | 54.00% | JUV | 41.77% | PN | 29.63% | PR | 20.97% |
| 7 | L* | 70.92% | JUV | 53.16% | L* | 41.50% | U-V | 29.55% | PQ | 20.65% |
| 8 | PA-PD | 70.59% | PF-PM | 52.94% | H-HA | 40.00% | Z | 29.27% | PN | 20.63% |
| 9 | PT | 70.59% | BF* | 52.85% | PN | 39.15% | JUV | 29.11% | PF-PM | 20.59% |
| 10 | R | 69.57% | BL-BX | 51.85% | Z | 39.02% | GV | 28.95% | J | 20.21% |
| 11 | GF-GT | 69.09% | HB-HJ (0 Bus.) | 51.25% | GF-GT | 38.18% | PS | 28.85% | PE | 19.57% |
| 12 | A | 68.75% | HM-HX | 50.99% | HF5001-6201* | 38.00% | J | 28.72% | PS | 19.23% |
| 13 | HF5001-6201* | 68.00% | A | 50.00% | R | 37.89% | R | 28.57% | B-BD | 18.87% |
| 14 | BL-BX | 67.90% | R | 49.07% | J | 37.23% | B-BD | 28.30% | C-F | 18.83% |
| 15 | PN | 67.72% | Z | 48.78% | BL-BX | 37.04% | PE | 28.26% | GV | 18.42% |
| 16 | PE | 67.39% | GV | 48.68% | PR | 36.02% | PR | 27.42% | R | 18.01% |
| 17 | PS | 66.48% | PR | 47.85% | C-F | 35.54% | L* | 27.12% | BL-BX | 17.28% |
| 18 | N-NX | 65.04% | B-BD | 47.17% | GV | 35.53% | PQ | 26.09% | Z | 17.07% |
| 19 | HB-HJ (0 Bus.) | 63.80% | C-F | 46.68% | PE | 34.78% | BL-BX | 25.93% | ML-MT | 16.49% |
| 20 | C-F | 62.47% | N-NX | 46.34% | HM-HX | 34.11% | GF-GT | 25.45% | L* | 16.34% |
| 21 | PR | 61.29% | J | 45.74% | U-V | 34.09% | C-F | 24.93% | K | 16.00% |
| 22 | J | 60.64% | PA-PD | 45.59% | PS | 32.97% | K | 23.33% | JUV | 15.19% |
| 23 | ML-MT | 60.64% | PQ | 44.57% | N-NX | 31.30% | S | 22.22% | QH-QR | 15.15% |
| 24 | B-BD | 58.49% | PS | 43.96% | PA-PD | 30.88% | HM-HX | 22.19% | S | 13.89% |
| 25 | PF-PM | 57.35% | S | 41.67% | S | 30.56% | QH-QR | 21.21% | N-NX | 12.60% |
| 26 | PQ | 55.43% | H-HA | 40.00% | PQ | 30.43% | PA-PD | 20.59% | HM-HX | 12.58% |
| 27 | QH-QR | 55.30% | U-V | 38.64% | P | 30.30% | ML-MT | 20.21% | PA-PD | 11.76% |
| 28 | Z | 51.22% | ML-MT | 38.30% | B-BD | 30.19% | N-NX | 19.51% | T | 10.92% |
| 29 | U-V | 50.00% | QH-QR | 35.61% | K | 29.33% | P | 18.18% | GF-GT | 10.91% |
| 30 | S | 47.22% | K | 35.33% | QH-QR | 27.27% | Q-QE | 17.32% | P | 9.09% |
| 31 | Q-QE | 46.85% | Q-QE | 33.86% | Q-QE | 25.59% | T | 13.45% | Q-QE | 8.66% |
| 32 | GC-GE | 45.83% | P | 33.33% | ML-MT | 25.53% | A | 12.50% | A | 6.25% |
| 33 | K | 44.67% | PT | 29.41% | T | 18.49% | PT | 11.76% | PT | 5.88% |
| 34 | H-HA | 40.00% | GC-GE | 29.17% | M | 16.44% | M | 10.96% | M | 5.48% |
| 35 | T | 34.03% | T | 26.05% | GC-GE | 12.50% | G-GB | 9.45% | GC-GE | 4.17% |
| 36 | M | 25.34% | M | 21.23% | PT | 11.76% | GC-GE | 4.17% | G-GB | 3.15% |
| 37 | G-GB | 14.96% | G-GB | 13.39% | G-GB | 10.24% | H-HA | 0.00% | H-HA | 0.00% |

Below aver of 59.99%

Below aver of 44.38%

Below aver of 33.06%

Below aver of 24.36%

Below aver of 16.43%



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Rankings Compared

Fiscal 2005

| Rank | Class Range | % of Items Circ'd |
|------|-------------|-------------------|
| 1 | BH-BJ | 76.47% |
| 2 | HM-HX | 75.17% |
| 3 | JUV | 73.42% |
| 4 | P | 72.73% |
| 5 | BF* | 72.36% |
| 6 | GV | 71.05% |
| 7 | L* | 70.92% |
| 8 | PA-PD | 70.59% |
| 9 | PT | 70.59% |
| 10 | R | 69.57% |

Fiscal 2006

| Rank | Class Range | % of Items Circ'd |
|------|-------------|-------------------|
| 1 | HM-HX | 69.25% |
| 2 | L* | 67.97% |
| 3 | PE | 67.86% |
| 4 | B-BD | 65.22% |
| 5 | BL-BX | 65.02% |
| 6 | R | 62.21% |
| 7 | GF,GN,GR,GT | 61.54% |
| 8 | ML-MT | 61.11% |
| 9 | BF* | 60.65% |
| 10 | GV | 60.00% |

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Top 10 Rankings by % Circulated

| Rank | FY05 | FY06 | FY07 | FY08 | FY09 | FY10 |
|------|-------|-------|-------|-------|-------|--------------------------|
| 1 | BH-BJ | HM-HX | PR | BH-BJ | GC-GE | PE |
| 2 | HM-HX | L* | Z | B-BD | T | H-HA |
| 3 | JUV | PE | BL-BX | Z | GV | BH-BJ |
| 4 | P | B-BD | PS | BL-BX | HM-HX | ML-MT |
| 5 | BF* | BL-BX | H-HA | PA-PD | Z | PT |
| 6 | GV | R | C-F | PS | H-HA | HM-HX |
| 7 | L* | GF-GT | GV | L* | R | PS |
| 8 | PA-PD | ML-MT | N-NX | ML-MT | PS | HB-HJ(excludes Business) |
| 9 | PT | BF* | T | P | BL-BX | L* |
| 10 | R | GV | PA-PD | Q-QE | BF* | PR |

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Next Steps

- Finish running reports for each fiscal year
- Set up reports to capture data for each year going forward
- Analyze Data!!!

Questions

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For More Information

- VALE Cooperative Collection Management Committee:
<http://www.valenj.org/committees/cooperative-collection-management>
- ACRL2011 Poster Session by Pam Theus (Wm Paterson Univ) & Mary Mallery (Montclair State Univ)
- Planned article by Theus & Mallery