



collectionHQ

data. insight. solutions.

SUPERCHARGE YOUR COLLECTION:

4 Steps to Boost the Patron Experience
and Maximize Circulation



*save*TIME



*save*MONEY



*improve*PERFORMANCE



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BACKGROUND

1.1. Background

Loss of tax support, staff and budget cuts, and reduction in service hours has put even the most efficient libraries under increased pressure to offer best value and drive improvements. Facing severe scrutiny from local and national government alike, public libraries are having to face up to some harsh realities - unless libraries can demonstrate their value to society, they will be seen as “easy” targets when it comes to cutting government spending. Libraries across the world are under real threat.

But the message is all not doom and gloom. The public library continues to improve the quality of life in a community. It is a purveyor of knowledge and information, closer to its community than many other types of public service. It is a base for community activities, training of illiterate, semi-literate and literate people alike, and a place for independent learning. It also provides materials for recreational activities. This societal role of the public library has been strengthened during the economic downturn along with the 3 core missions a library serves to the public “promoting reading, offering access to information and anchoring communities”, culminating in more visits to the library. Therefore, despite cuts, public libraries can take positive steps forward and use this reinforced purpose within the community to develop initiatives that drive more visits and increase circulation.

You may ask, how is improved collection performance achieved when budgets are tight

and staff time is limited? Our research reveals that in the average public library, 2% of the collection has circulated more than 100 times and so has a strong likelihood of being in a poor physical condition while 25% of the collection has not circulated in over 12 months. Of particular concern, on average 15% of new items purchased by public libraries globally in the last 12 months have never circulated and are therefore ‘Dead on Arrival’ or DOA. Without access to tools that can easily and quickly provide direction on how to make improvements, a librarian’s hands are tied. How does a librarian even begin to understand where the problems and inefficiencies are hiding? The problem becomes not the lack of access to data but rather the lack of direction on what to do with that data. Methodology based solutions which incorporate “Big Data” to make better, more efficient decisions can help libraries get more from their current holdings, buy more effectively to meet demand, provide a diverse but targeted range of material within budget constraints, and, importantly, free staff time from mundane tasks onto value-add library activities such as serving patrons and promoting the collection. Such initiatives are now key to the survival and future of the library. There is one unique tool available today which supports efficient and measurable collection improvements: collectionHQ.

1.2. Making Sense of Big Data

Big Data and analytics have been at the heart of commercial business now for several years. With the capability of this data to provide the insight required to improve “operations, customer experiences, and strategy” (Barton & Court, 2013) there is a strong argument for the use of Big Data in public libraries today. Most libraries will already be familiar with the term “data-driven analytics” which incorporates Big Data to support efficiencies and Patron Driven Acquisitions. This data can provide a wealth of insight into the performance of a library’s collection from a comprehensive, system-wide level to a more granular, branch level. To make use of this data, an efficient and effective method which collates, evaluates and provides direction is required. Referencing the article by McKinsey Director, David Court and Global Managing Director, Dominic Barton, featured in a 2013 Harvard Business Review, this section will illustrate the 3 key stages to using Big Data effectively.

I. Choose the right data

Public libraries are offered a myriad of data from their ILS (LMS) which, when applied correctly, can support better purchasing, positioning and collection maintenance decisions. The problem facing library managers is not the lack of data, but establishing the right data to use and how to use it. Determining which data is important comes from identifying the key challenges facing the library and establishing the insight required to overcome those challenges. Once this data has been identified, what do we do with it?

II. Build models that predict and optimize business outcomes

According to Barton & Court, “Data are essential, but performance improvements and competitive advantage arise from analytics models that allow managers to predict and optimize outcomes.” In other words, an analytical “model” which allows library managers to set hypotheses or parameters that indicate when certain actions must be carried out in line with strategic objectives, helps put this data to best use. Barton & Court warn that some “models” can be “too complex” and can “exhaust most organizations’ capabilities.” A tool which incorporates a clear “methodology” allows the use of Big Data to be transferrable to frontline staff, supporting the sustainability of analytical methods by incorporating the technique into daily workflow.

III. Transform your library’s capabilities: introducing a methodology

A proven methodology can be of huge benefit, by using information in a structured way to provide direction. While there will always be effort involved in embracing the methodology, a company can adopt a new way of working with the comfort that it has for some time been regarded in its sector as ‘best practice’. The EBSM methodology, which has now been practiced in public libraries worldwide since the mid 1990s, is a prime example of a solution to the data overload problem for libraries. EBSM is a proven methodology for continuous library collection performance improvements, based around a series of tools that create ‘action plans’ within a target driven framework.

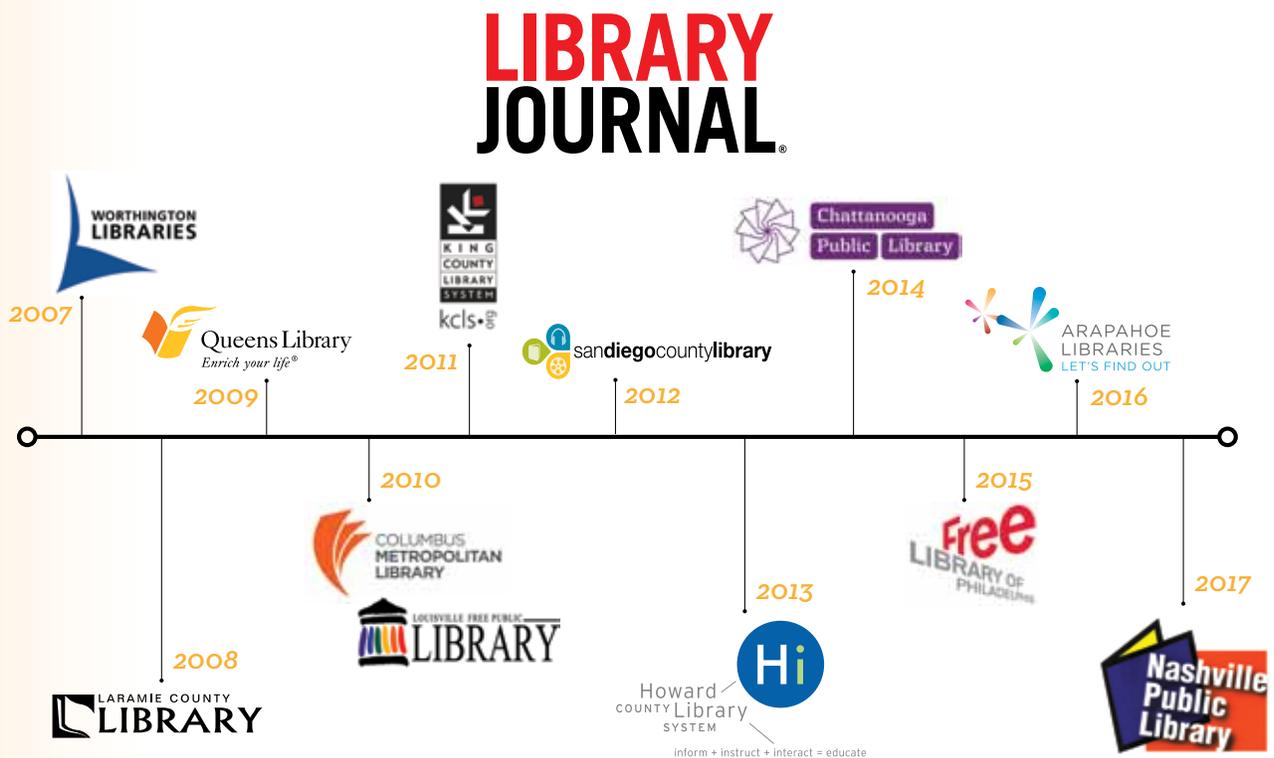
The key benefits that a methodology brings are structure and direction. Structure is enabled via the framework, meaning that everyone in the library system is working towards the same goal: based on

targets and parameters that everyone has agreed. Direction is provided via the action plans – clear unambiguous advice on what to do at the shelf to improve the profile of the collection – item by item, collection by collection, location by location.

Each of the tools and action plans have been designed with one purpose in mind - removing waste, hence cutting out cost from internal processes.

1.3. collectionHQ

collectionHQ is the world’s leading collection performance improvement solution. collectionHQ puts the EBSM methodology into practice by defining 4 key steps - providing action plans for each - that librarians can follow to make repeatable improvements to their collections. Award winning libraries the world over use collectionHQ to develop and manage their collections. Since 2002, Library Journal’s ‘Library of the Year’ and ‘Librarian of the Year’ awards have been presented to Libraries or Librarians who actively use collectionHQ to make collection performance improvements.



Corinne Hill, Executive Director at Chattanooga Public Library (TN) and Library Journal’s ‘Librarian of the Year 2014’ shared: “With collectionHQ, our staff can use “big-data” to make evidence based collection management decisions confidently and efficiently. As a result, our library is able to provide a better customer experience and our circulation has increased by 25%!”

CIRCULATION UP **25%** →

1.4. Research Methodology

The following document is based on research from a number of reliable sources including case studies, journal articles, library vendor statistics and industry websites. Predominantly, our analysis comes from a database of over 500 public libraries around the world using the collectionHQ. We have taken a sample from this database which has been grouped according to the size of the population each library serves. We will refer to the following groupings throughout the document:

GROUP 1

Libraries serving populations over
1,000,000

GROUP 2

Libraries serving populations from
500,000 to 999,000

GROUP 3

Libraries serving populations from
250,000 to 500,000

GROUP 4

Libraries serving populations from
100,000 to 249,000

GROUP 5

Libraries serving populations up to
100,000

collectionHQ is used in
MORE THAN 600
public libraries worldwide



INTRODUCTION

Based on our findings surrounding the role of the library in the community and the impact of Big Data on driving collection performance improvements, this document will explore inefficiencies in the library sector to assess what can be improved and what savings can be made. The analysis will be divided into four sections to reflect the four key stages of developing a patron-driven, targeted collection as defined by collectionHQ: **Select, Manage, Promote and Evaluate.**



Select

Within selection, the satisfaction of patron requirements relies on one key factor: the alignment of material supply with demand. This document will explore the statement that to encourage patron support, (and, in turn, make time and cost savings), evidence of demand – whether from ‘holds’ (readers’ requests) or browsing - is vital when setting budgets and making purchasing decisions. The discussion will continue onto recent developments in Selection that can offer public libraries significant opportunities to make more informed and more efficient purchasing decisions.



Manage

Once selection efficiencies have been optimized and a structure is in place to make more informed purchasing decisions, how can public libraries streamline collection management procedures ensuring less staff time is spent manually weeding shelves and more time can be spent with patrons? The document will demonstrate the time savings that can be made by creating a schedule of evidence based processes for weeding items that have poor circulation (dead) or are in a poor physical condition (grubby). Considering both floating and non-floating collections, we will identify steps that can be carried out to ensure ‘dead’ items are given several opportunities to circulate through replacement of ‘grubby’ counterparts and through transfer to locations of increased demand.



Promote

From the discussion on how best to manage items, the paper moves on to discuss how those items can be optimized while on the shelves. Evidence based methods of promoting material through the use of charts and displays can promote new or overlooked items, helping a library to increase circulation. As important as the implementation of new promotions is the measurement of marketing activities. Most library services carry out an array of marketing activities, some more extensively than others, but a common failing is that the outcome of each individual marketing initiative is seldom measured empirically – resulting in lost opportunities to buy better, and repeat purchasing in subject areas that empirical measurement would have advised against.



Evaluate

Finally, the paper concludes with discussion around the metrics that can be introduced to monitor the success of your collection development strategy. The incorporation of evaluation techniques and an evidence based methodology into monitoring procedures ensures ready access to trends and turnover improvements allowing for action to be taken, if required, in a targeted and efficient fashion.

The efficiencies discussed in this paper are both practical and realistic – they are all based on improvements that can be made across a library without spending vast amounts of money, but by investing in staff time to change working practices.





Select

3.1. Breaking the Cycle

Carrying out selection in line with patron demand has historically relied on the ‘gut instinct’ of librarians based on patron feedback and check-outs. As the digital age continues to enhance processes in public services, libraries are no different. The increased use of self-service and library electronic services to place ‘holds’ (readers’ requests) have reduced the accuracy of this ‘gut instinct’ and the risk of making wasteful purchases is heightened. ILS (LMS) data can indicate circulation trends but this is a labor intensive technique which is not readily accessible for all staff and therefore hard to incorporate into daily workflow to maintain high collection standards. Selection as a result is one of the most cost intensive aspects of providing a library service to the public. Both in terms of the new product cost (i.e. new books and other material) and staff time to select the most appropriate material, the opportunities to remove waste and cost from this function are considerable.

3.1.1. DOA

A new metric Dead on Arrival or DOA, measures new items added to a library collection over a 12 month period, which subsequently do not achieve more than one circulation.

In theory, all public libraries should aim for the percentage DOA of their collection to be 0%, although this goal can take time depending on your current “score”. Lowering your DOA score is achieved by selecting items based on patron demand, buying the right quantity of items – not too many, and by distributing items proportionately to branch locations relative to local circulation evidence.

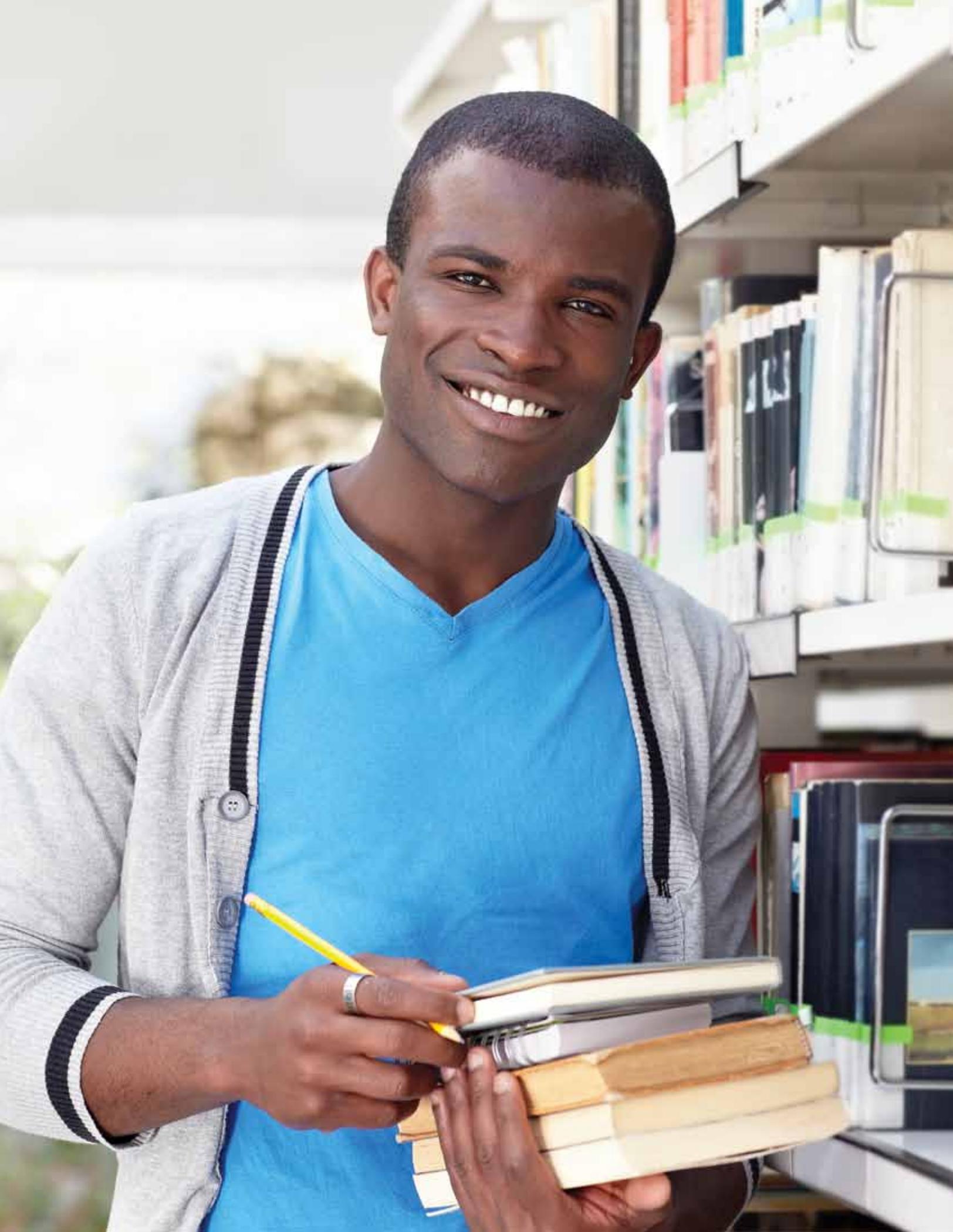
Country	DOA Percentage
USA	16.4%
Canada	17.5%
United Kingdom	16.4%
Australia	10.7%
New Zealand	12.2%



3.1.2. Holds Analysis

Understanding different types of demand, from browser demand to demand from holds (readers’ requests), is an essential step in developing a patron-driven collection. Better meeting demand from holds starts with establishing how much demand comes from this source against demand generated from patrons browsing shelves. If we assume that the average library receives 15% of check-outs from holds against 85% of check-outs from browsing, considering both types of circulation is essential. collectionHQ is the only tool which provides analysis based on both holds and browser check-outs.

Delving deeper into holds, how can you monitor your holds demand in comparison with current holdings? For example, do you have enough items in your collection to meet the holds requests?



collectionHQ's 'holds: holdings' ratio provides a solution and reveals the locations where the most holds are placed.

The ability to monitor your library's number of holds in relation to holdings helps identify any gaps in supply and guide selection to align that supply with holds demand. What's more, the option to view by location where the majority of holds demand comes from, allows libraries to ensure that those branches with high demand from holds are equipped appropriately. Incorporating evidence based holds analysis into workflow keeps waiting time for holds requests down and results in a collection that is more reflective of what patrons want.

3.2. Evidence Based Budgeting

Ensuring that your collection meets patron demand starts with intelligent budgeting. The allocation of budget per location, title, genre, author and format must reflect evidence of circulation to ensure the right items are at the right branches and to avoid 'panic-spending' at the end of the fiscal year or worse, lacking the budget available to make crucial purchases throughout the year.

collectionHQ 'Spending Plans' deal with this issue head on by taking a library's annual material budget and cascading this amount through locations, titles, genres, authors and formats based on evidence.

Once your budget has been allocated by collectionHQ, adjustments can be made before finalizing your spending plan. The true beauty lies in the time saved from the number crunching part of the process and the avoidance of wasteful spend on areas that have little evidence of circulation.

3.3. Evidence Based Selection

Once your material budget has been allocated accordingly, collectionHQ will provide continued support for selection decisions made throughout the fiscal year by creating detailed selection specifications by genre, subject, author, publisher, series and format. These specifications are available for print,

CASE STUDY



sandiegocountylibrary



When San Diego County Library system was planning for the opening of two new buildings, the collections staff used collectionHQ to provide a detailed look at what kinds of books in the system circulated most and alter selection based on this. Traditional library buildings in San Diego allocated about 70 per cent of shelf space to Non-Fiction titles. But in looking at what titles were actually circulating, library staff members realized that fiction works should take the majority of space.

Using evidence based analytics at the library with collectionHQ has further helped by revealing exactly what percentage of the budget should be allocated to certain collections based on demand. "We're not buying titles that are just going to sit there, or buying too few copies," says Collection Development Manager Heather Pisani-Kristl. "We can't afford to make bad purchases."

electronic and A/V material, and can be tailored by individual selectors within a controlled environment, before being finalized to represent what should be purchased.

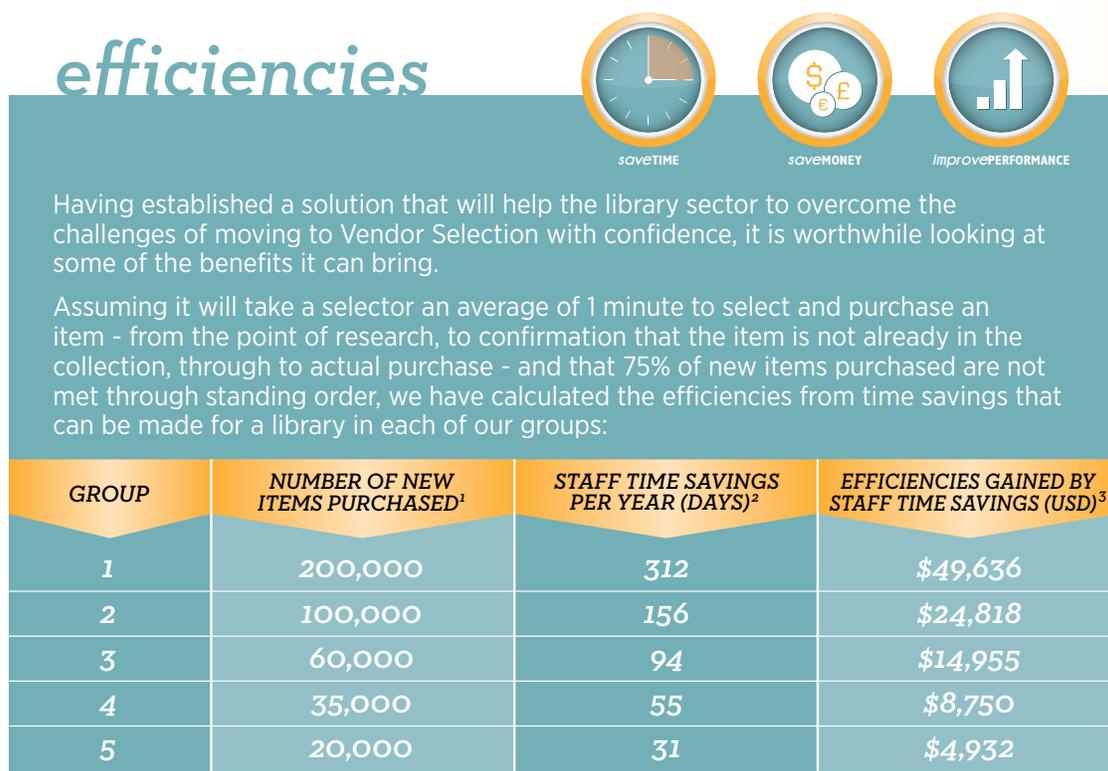
3.4. Vendor Selection

Around the world, many public libraries have been working in partnership with their materials vendor on selection. The practice of providing the vendor with a detailed specification and a budget for them to make selections (Vendor Selection) is widely used in the United Kingdom, Australia and New Zealand. Using evidence to inform the specifications and monitor results and feedback is important to ensure ongoing success with Vendor Selection.

This section will consider the introduction of evidence to the Vendor Selection process to build selection specifications which provide a shareable selection profile that vendors can use to ensure items purchased meet library requirements and are within the library budget. The analysis will go on to discuss the development of Vendor Selection in the U.S. market and how the practice can now fully support Patron Driven Acquisitions with the introduction of ESP – Evidence based Selection Planning, a service from Baker & Taylor.

3.4.1. Sharing specifications

So, how can detailed purchase specifications be shared with a materials vendor? Putting the EBSM methodology into practise with collectionHQ supports this process by generating evidence based purchase requirements efficiently, ensuring that the specifications shared with vendors are reflective of patron demand.



¹ Based on 10% of total holdings purchased new per year

² Based on 8 hour working day

³ Based on average salary across all groups of \$35,000 (from Bibliostat Census data 2011)

While these savings need to be offset to some degree by the slight increase in charges made by the vendor for Vendor Selection, the net savings that Vendor Selection brings are still considerable.



Also important in getting this process off to a good start is regular interaction between both parties. Handing more responsibility over to your vendor does indeed require a level of trust which can be developed by working closely with vendor selectors in the early stages to review specifications and explain your requirements. Once that foundation is built, Vendor Selection can become a productive and high performing service that really starts to meet local patron needs. Given the right degree of flexibility, your vendor will have the expertise to suggest forthcoming titles or titles that you might not be aware of which will keep your collection relevant and exciting for patrons.

3.4.2. Enabling independent performance monitoring and analysis

With many libraries around the world having used Vendor Selection for over 10 years, the efficiencies and the benefits the service can bring to your collection are proven and, once implemented, Vendor Selection can easily become an integral part of library workflow.

Nevertheless, when opting to move to Vendor Selection it remains important, as with all collection management and development activities, to have a process in place to monitor performance both from the perspective of supply quantities (“did we get what we asked for?”) and supplied material performance (“is the material performing as we had hoped?”).

Before embarking on Vendor Selection therefore, it is essential for a library to understand how it is going to monitor the performance of its Vendor Selection process. collectionHQ offers a comprehensive

suite of tools which allows libraries to monitor circulation trends of new items purchased by vendors on an ongoing basis. Such tools highlight areas of success and provide direction on areas where there is room for improvement which can be shared with your vendor.

CASE STUDY



Yours to Explore

Phoenix Public Library

www.phxlib.org



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A case study example from Phoenix Public Library suggests that using collectionHQ with Vendor Selection has reduced the time taken to carry out selection from 9 months to 3 months.

Vendor Selection overall has helped Phoenix Public Library to achieve a smooth transition to centralized selection and a ready supply of current and forthcoming titles driven by demand. Between 2004 and 2012, circulation at the library increased by 50% (per State Library statistics) and staff time was freed up to focus on other high priority tasks. Kathleen Sullivan, Collection Development Coordinator at the library comments that the work carried out by vendor selectors “represents at least two librarian 2 positions”, that’s a total of \$50,000 that can be redeployed to other, value-add activities.

3.5. Evidence based Selection Planning

Combining the benefits of evidence based and vendor selection is Evidence based Selection Planning or ESP. ESP as a service combines data analytics from collectionHQ with the collection development



expertise of Baker & Taylor to help selectors choose the right titles, in the right quantities, for the right locations. ESP offers a powerful ranking engine which scores both current and pre-published titles based on circulation evidence, reviews and a series of metadata to help selectors decide which items are going to circulate well in their collection. ESP then advises which quantities to buy and how to distribute new material across library branches to match collection supply with demand.



Find out more at www.collectionhq.com/esp.

CASE STUDY



Chattanooga

Public Library



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saveMONEY



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One of the first public libraries to introduce ESP was the Chattanooga Public Library, TN. Carol Green, Collection Development Librarian explained the reason behind the decision: “We wanted to create a collection strategy to aid in our budget for outcome while trying to build a more holistic collection that goes beyond the bestseller lists. We felt ESP would give us a tool to make the selection process easier and give our staff some accountability and focus when it came to selecting materials.”

Having used ESP consistently to advise selection and distribution, Chattanooga Public Library staff have successfully increased circulation and turnover of the collection. Library Director, Corinne Hill, shared: “We hit a million plus circs last year for the first time ever and I give credit to collectionHQ and ESP. Our turnover rate is 3.2 and I’m super pleased.”



4.1. Maximize your existing collection

While sufficient procedures must be introduced to support selection of new material in line with demand, libraries should consider ways in which spending can be put to best use by maximizing the current collection.

Effective collection management which can be carried out efficiently and on a routine basis is key to optimizing the appeal of the material on your shelves to ensure patron satisfaction and increase circulation. As a follow on to collection maintenance or 'weeding', wise 'Transfer' decisions supported by evidence should be considered for the replacement of overused items with material already available in the collection and for the movement of poor circulating items from one location to a library of higher demand.

4.2. Effective collection maintenance

As important as developing your collection in line with demand is ensuring that material on your library's shelves is in a good physical condition therefore appealing to patrons. Relying on ILS (LMS) data alone for the task poses several key issues 1) lots of data lacking in direction means manual checks of items are required; 2) often, technical support is required to actually run and translate the reports meaning the data is not easily accessible for all; and 3) differences of opinion come into force - one man's trash is another man's treasure. As a result, the implementation of regular and efficient collection maintenance that is standard across a library system using the ILS (LMS) is as arduous to roll out as it is to monitor: leaving little staff time for other patron-centric tasks.

To overcome this challenge, incorporation of a tool that delivers evidence based weeding action plans that direct staff to the items in a poor condition (grubby) or which are not circulating (dead) by generating 'action plans' based on the EBSM methodology. These action plans are easy to use and accessible for branch staff which allows libraries to introduce regular collection management and to promote system-wide weeding. What's more, management can set guidelines by which the action plans are generated and can monitor branch weeding activity to ensure standard procedures are followed across the branches. As a result of more regular, efficient and consistent collection management activities supported by collectionHQ, collection performance is improved and staff time can be freed up.

4.3 Schedule Management

To stay on top of collection management activities, library managers need the ability to not only assign tasks to team members, but to monitor task completion.

collectionHQ's Scheduling module allows managers to monitor use of the EBSM methodology by creating a calendar of tasks which can be assigned individually to staff members. Staff members receive

reminders when tasks are due so they can manage workload effectively to meet deadlines. Meanwhile, management can track the tasks that are complete and those still in progress thanks to the presence of checkboxes which staff members check off after completing each task.

The Scheduling module plays an integral part in the implementation of EBSM into library workflow with collectionHQ. In turn, the tool increases efficiencies across all staff levels: management are notified of tasks which need to be followed up and staff members are reminded of when tasks are due.

CASE STUDY

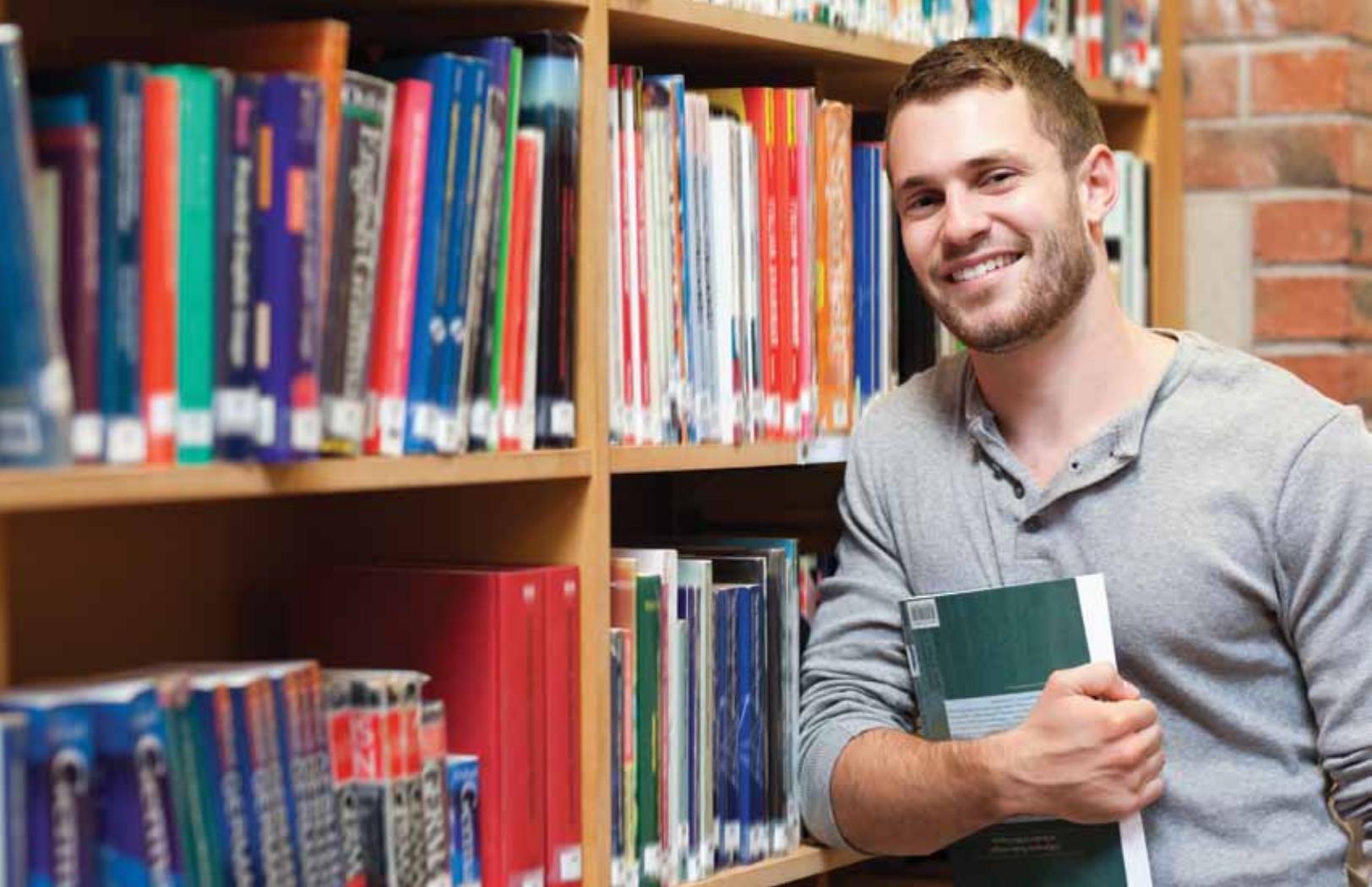


 **Angus Council Libraries, Scotland**, Angus Council Libraries got straight to work with the collectionHQ Scheduling Module after its release in March 2015. As a result of scheduling tasks with the tool the library team has achieved time savings, staff members have become more empowered to carry out tasks proactively, and large scale projects have been easy to roll out. Overall, the tool has supported an increase in productivity as Vicky Fraser, Support Services Librarian, comments: “Since April when we introduced the Scheduling Module I can see that Top Charts for Non-Fiction and Fiction have been run 193 times as opposed to 5 before we started scheduling tasks with collectionHQ.”

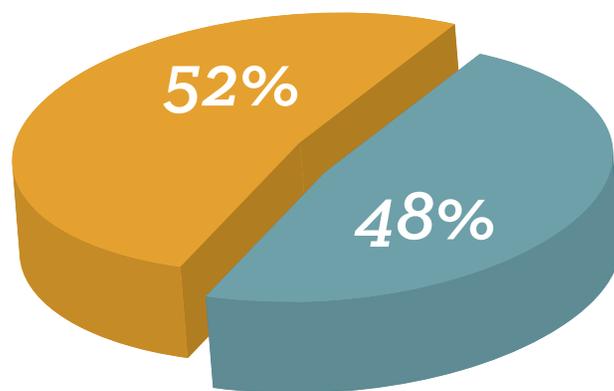
4.4. Evidence Based Floating Item Management

52% of collectionHQ customers worldwide have some floating collections which are proven to maintain movement of items between branches, to meet patron holds requests more efficiently and to encourage a ‘one-system, one collection’ philosophy. The key difference between floating and non-floating collections is that items remain at the branch where they are returned to by a patron. This feature can cause ‘pooling’ issues where there becomes a surplus of items at one location.

To overcome this ‘pooling’, collectionHQ provides tools to intelligently rebalance floating collections; ‘pulling’ items from locations of low demand which are overstocked or ‘pooling locations’ and ‘pushing’ them to locations of high demand which are understocked.



collectionHQ Customers: Floating vs Non-Floating



- *Floating Collection*
- *Non-Floating Collection*

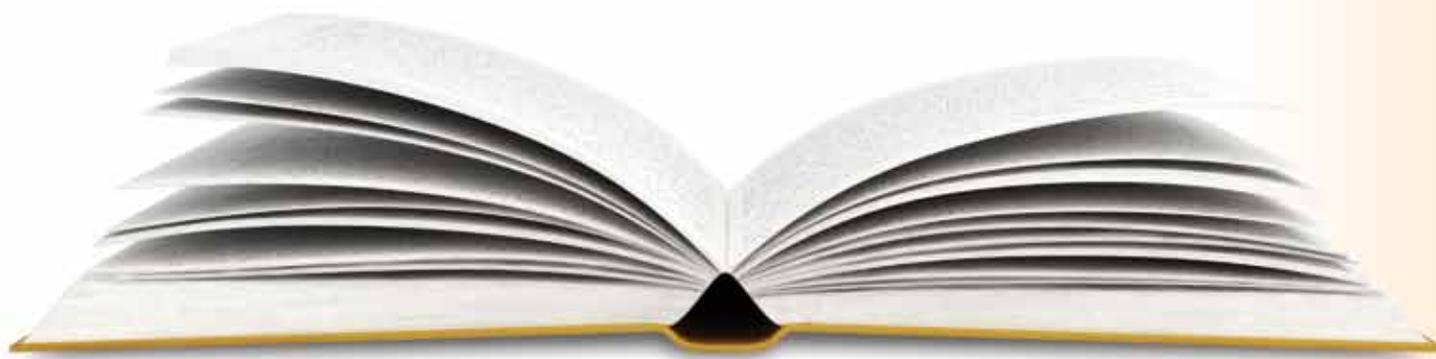
4.5. Evidence Based Collection Movement

To improve the results achieved with a floating collection or where a library does not have a floating collection, collectionHQ provides evidence based collection movement action plans to align supply with demand across the library.

EBSM outlines 3 main concepts which underpin collection movement:

- i. If an item is currently well used in its original location – do not move it! It may end up sitting around in another location where no demand exists while its absence frustrates users in the location where high demand still exists.
- ii. If demand exceeds supply in any location (e.g. low shelf representation of popular authors or subjects), transfer any matching underused stock from elsewhere in your service. This provides three benefits: increased user satisfaction in the ‘receiving’ library because of better shelf availability, maximum use from existing items, and weeding of underused stock from the ‘providing’ library.
- iii. If in certain subjects, low demand exists in more than one location, arrange for ‘swapping’ of that material between locations. This refreshes items through item movement and is likely to lead to additional use for material which has been sitting around unwanted in its original location.

collectionHQ helps to deliver these 3 concepts via a number of tools – Popular Author Transfer, Popular Subject Transfer, Overstocked Subject Swap and Floating Rebalance tools.



efficiencies



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By combining the above 3 concepts, evidence based “intelligent” collection movement can be achieved in a very practical manner. The key question is of course, “what benefits will this bring?”

Under evidence based collection movement, collectionHQ’s Popular Author Transfer and Popular Subject Transfer tools can identify Fiction and Non-Fiction items that can be moved to locations of higher demand to increase circulation, fill gaps and avoid the need to spend on new material. Assuming each Fiction item receives an additional 2 circulations after transfer and each Non-Fiction item receives an additional 0.5 circulations, the table below illustrates the average number of items available for transfer and the additional circulations those items can generate. The budget available for redistribution has also been calculated based on an average Fiction book price of \$10.61, an average Non-Fiction book price of \$16.42 and the assumption that that each item transferred has 50% of useful life remaining.

GROUP	ITEMS AVAILABLE FOR TRANSFER		ADDITIONAL CIRCULATION		BUDGET AVAILABLE FOR REDISTRIBUTION (USD)	
	FICTION	NON-FICTION	FICTION	NON-FICTION	FICTION	NON-FICTION
1	6,016	11,647	12,032	5,824	\$31,915	\$95,622
2	2,986	8,913	5,972	4,457	\$15,840	\$73,175
3	1,680	4,409	3,360	2,205	\$8,912	\$36,198
4	921	1,454	1,842	727	\$4,886	\$11,937
5	366	873	732	437	\$1,942	\$7,167

CASE STUDY



Wyndham City Library Service, Australia, used collectionHQ to support a Fiction transfer project in which 369 items that had been dead for an average of 9 months were transferred to new branches to fill demand gaps. As a result, those items have received a further 973 circulations with an average of 3.5 months since Transfer. Transfers have also been carried out for the Non-Fiction collection with 387 Non-Fiction titles that were dead on average 7 months before transfer, receiving 610 circulations in the 6 months following transfer.



Mid-Columbia Libraries (WA), U.S.A., used collectionHQ to identify 6000 items that were dead an average of 10 months. After Transfer, these items achieved over 23,000 circulations.



Worcestershire Libraries, U.K., transferred 1762 Fiction items between 2012 and 2013, all of which had been dead on an average of 7.35 months. Since Transfer, those items have generated 7162 circulations over an average of 8.95 months.

4.6. Grubby Item Refresh

The theme of using collectionHQ to identify ‘dead’ material then rectifying with Transfers can also be applied to the refresh of ‘grubby’ material. It has been established that collectionHQ helps to direct staff to items in a poor physical condition for removal. But once those items are removed, how can we continue to maximize our existing collection before purchasing new replacements?

In collectionHQ, the tool ‘Grubby Item Refresh’, illustrates what can be achieved with some imagination coupled with a structured approach to collection management. Grubby Item Refresh derives from a very simple premise: that the best use of an underused item in a branch (branch A) would be to transfer it to a location (branch B) where demand has already been demonstrated by the very poor physical condition of the same title in that branch. In other words, grubby items in branch B - which are about to be thrown out and in most cases repurchased to satisfy demonstrated demand - can be replaced with a relatively new, underused copy of the same title from branch A.

While this tool is built upon a relatively simple premise, it takes a framework to present it in a useable manner—with the controls built in to stop librarians from attempting to select the same item at the same time, and to ensure that standard agreed parameters that define what is underused and in an acceptable physical condition for transfer can be applied across the library service to achieve a uniform result. This single tool is typical of the many tools within collectionHQ that use the same framework based process to bring repeatable system-wide efficiency improvements and reduction of waste.

efficiencies



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ImprovePERFORMANCE

Consider then what the benefits of the Grubby Item Refresh tool alone might be. Assuming an average Fiction book price of \$10.61 and an average Non-Fiction book price of \$16.42, that there is 50% of useful life left in each book that could be transferred and that we only transfer 50% of those recommended items, the table below illustrates some significant savings that can be made through maximizing your existing collection.

GROUP	ITEMS AVAILABLE TO REPLACE GRUBBY COUNTERPARTS		BUDGET AVAILABLE FOR REDISTRIBUTION (USD)	
	FICTION	NON-FICTION	FICTION	NON-FICTION
1	57,188	32,228	\$303,382	\$264,592
2	21,892	9,079	\$116,137	\$74,539
3	10,047	3,724	\$53,299	\$30,574
4	4,317	1,575	\$22,902	\$12,931
5	1,241	426	\$6,584	\$3,498



5.1. *Measuring your marketing initiatives*

For years, public and private sector companies alike have been using a variety of techniques to market products and measure the results of promotional activities. In public libraries, marketing is used to widen the reach of library collections. From branch displays to presenting top titles on your library website, promotion of your collection is a guaranteed way to generate interest amongst patrons and encourage circulation.

As with all marketing activities, introducing steps that measure the impact of your efforts are vital to ensure that they have achieved a suitable return on investment and to help with effective planning of future campaigns.

Experimenting with new collections where there is perceived demand can also be enhanced if supported by a targeted marketing campaign. For example, based on demographics or patron requests, one of your branches may become a contender for more foreign language material. The best way to establish whether that demand exists and the collection adjustments required to meet that demand is to purchase small, promote heavily then measure the outcome. Measurement of experimental marketing campaigns will show one of three results: 1) there is a high demand for those items and you should invest more in that collection, 2) you are adequately stocked in that collection and don't need to purchase more items, 3) there is little or no demand for that collection in which case you should not invest in that collection and consider moving existing items to a new location.

A final important point to make about measuring marketing activities is that measuring something requires recording statistics and outcomes about it. This means that outcomes can be shared, and ultimately expensive repeat mistakes can be avoided.

5.2. *collectionHQ and Marketing*

collectionHQ offers a number of marketing tools, some of which are based around setting up, recording and measuring initiatives, and some of which simply, but very effectively, help a library to promote the work that it is doing around the initiative. This section will explore the Experimental Selection, Experimental Placement and Top Charts tools.

Experimental Selection enables a library to act on patron requests by carrying out small volume purchases to meet a perceived demand for which performance reporting is provided to analyze the success of the experiment over time. This practice can also be used to measure the demand for staff intuition – many local branch staff will have a 'gut feeling' that local demand exists for a subject, and performance measurement of material purchased to meet this demand will demonstrate one way or another whether the demand is real.



Experimental Placement can help to enhance the performance of those items, languishing in dark corners of a library which might well be successful if they are moved to a brighter, more prominent position, or items not in demand in one library might work well elsewhere. The Experimental Placement tool can also be used in campaign based marketing. Local campaigns can be time consuming, but are potentially very rewarding events for the library and patron alike. Measuring the effectiveness of time spent on a campaign will inform the library whether the campaign should be repeated in the future - the Experimental Placement tool can be used to 'tag' items that relate to the campaign and monitor the subsequent circulation performance of tagged items during and after the campaign.

Top Charts completes the marketing toolset by enabling the library to very effectively publicize the top circulating titles, titles it has just acquired, titles it has moved to a new location, or the titles it has gathered together for a local campaign.

More generally, Top Charts can simply be used to promote all of the good work that has gone into aligning the library collection with local demand using evidence based selection - for example placing .pdf copies of Top Charts for any combination of libraries and collections onto the Library website, or submitting them to local newspapers for publication.

CASE STUDY



saveTIME



saveMONEY



ImprovePERFORMANCE

Worthington Libraries (OH), U.S.A., had invested much time in creating eye-catching “Powerwalls” to promote certain areas of their collection. Missing, however, was a method to measure the performance of Powerwalls to assess the impact of promoting items this way on circulation levels and to evaluate whether staff time spent creating Powerwalls was time well spent. Use of collectionHQ Experimental Placement tools provided staff with the much needed insight into the performance of the displays to find out what was working well and what was not. As a result, items within the displays could be swapped or added to in order to increase circulation.



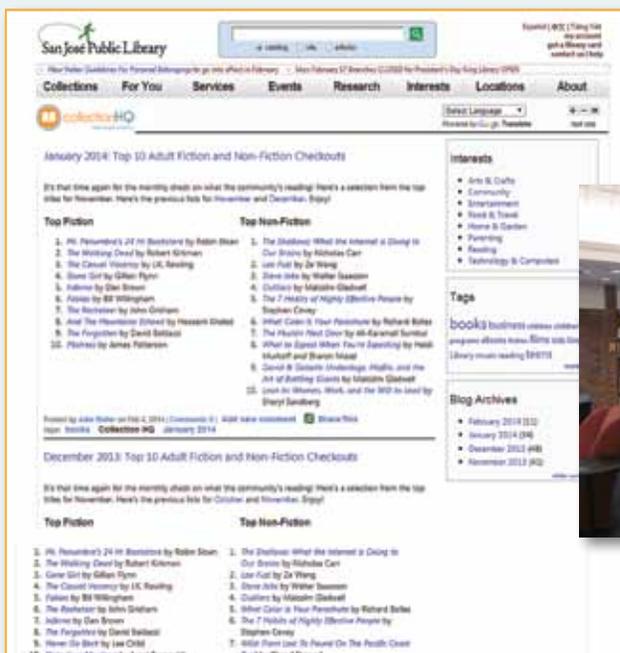
New York Public Library (NY), U.S.A., has been able to build promotional displays based on evidence of top authors or top titles at each branch. One such display was a “read-a-like” promotion where the staff identified less known authors from genres which had proven to be popular with their community. This has helped to expose those authors to new audiences and has in turn helped to increase the circulation of those items.



Warrington Libraries, UK, have used collectionHQ to identify “hidden treasures” – titles by less well-known authors or debut titles that had been overlooked by patrons. Creative displays were built around this theme to promote those items and attract the attention of patrons. As a result of this initiative 95% of those items that had been “dead” received subsequent circulations.



San Jose Public Library (CA), U.S.A., uses collectionHQ ‘Top Charts’ to share on the library website. This not only promotes the collection but keeps the library’s website up-to-date and informative.





EVALUATE



Evaluate

6.1. Monitor performance

Perhaps the most important step of the collectionHQ workflow is evaluation. Evidence based evaluation and assessment of selection, management and promotional procedures allows library management to 1) ensure branch staff have grasped the methodology behind evidence based collection management activities and are carrying out those tasks regularly, 2) discover how their library compares with others using the EBSM methodology on a local, regional and national level, 3) identify areas of the collection that need to be improved – areas that are understocked, overstocked or ‘grubby’ to name a few.

Processes can be introduced that support performance monitoring on a collection wide level and on a more granular level. collectionHQ’s Dashboard and Performance tools offer users insight into changes in performance over time with the option to drill down by format, genre, subject and location.



6.2. Staff acceptance of evidence based workflow

Changing to an evidence based workflow will allow staff to become more involved in collection management tasks, encouraging them to approach these activities from more of a system-wide standpoint. A smooth transition in workflow requires thorough staff understanding of how to use EBSM and the development of EBSM ‘champions’ which can be encouraged through observation of how staff members are using collectionHQ. Relying on staff feedback alone to gauge how the transition to an evidence based workflow has been received does not provide the most accurate picture. Those who don’t understand the collectionHQ toolset or who are adverse to change might be nervous or unwilling to come forward with their concerns. collectionHQ’s Administration module offers a granular insight into use of collectionHQ per registered user. The frequency by which each user logs in to collectionHQ can prompt several actions from management:

High frequency: the user understands the importance of EBSM and is proactively using collectionHQ to incorporate evidence into their workflow. In this case, management should recognize this commitment, requesting feedback from the individual and encouraging them to share their experience with colleagues.

Low frequency: the user may be struggling to grasp parts of the toolset or is nervous about adopting a new way of working. This should signal a need for training or involving the individual in team based work with EBSM concepts to encourage more practical learning of the methodology.

Proven time after time is that the quick results yielded by collectionHQ avoid the cases of low frequency users. Any users who don't adopt the tool right away are soon converted after witnessing the results it helps to achieve either by performance action plans or simply the improved appearance of their shelves and increased patron satisfaction. Furthermore, as collectionHQ and EBSM Training is becoming recognized in more and more locations as accredited sources of Continuing Professional Development (CPD) for licensed librarians, staff are motivated by the career progression that use of the solution can bring. It should be noted that implementation of a task calendar via the collectionHQ Scheduling module will increase the chance of converting low users to high frequency users.

6.3. Peer comparison

To monitor how your selection decisions are improving and to assess whether your library collection is keeping up-to-date with the latest reading trends, collectionHQ offers an intelligent 'Discovery' tool. Discovery is designed to let librarians 'discover' what items are popular at other libraries on a local, regional and national level and compare with their own holdings. From this comparison, libraries can purchase more items if they are understocked or introduce new titles to patrons that have not been shelved before at their library. Discovery as a whole can provide the basis for creative marketing displays which reveal to patrons what is popular nationwide and can boost circulation by injecting new life into the collection.

Rank	Titles	Holdings	Checked	Grabbable	Reviewed
1	Sycamore Row by Grisham, John 326488 circulations with a circulation rate of 0.89	131	0	0	35
2	Gone girl : a novel by Flynn, Gillian, 319794 circulations with a circulation rate of 0.8	127	0	0	91
3	The Third Wheel by Kinney, Jeff 277354 circulations with a circulation rate of 0.85	151	0	0	73
4	Hard Luck by Kinney, Jeff 206114 circulations with a circulation rate of 0.86	173	0	0	41
5	Inferno : a novel by Brown, Dan, 265070 circulations with a circulation rate of 0.75	138	0	1	57
6	The longest ride by Sparks, Nicholas	75	0	0	14

6.4. Room for improvement

Next comes the really interesting part. Once the EBSM methodology is adopted, collectionHQ supports the concept of continuous improvement by offering a detailed view of how your collection is performing.

On roll out of the workflow, collectionHQ will highlight those parts of your collection that are understocked, overstocked or in a poor physical condition. It will also allow you to monitor closely your digital collection by providing a side-by-side comparison of ebook versus print performance. Referring to the first three stages of the workflow 'select', 'manage' and 'promote' will help to 'tidy up' those areas, placing your collection in a prime condition to schedule methodical collection management and development activities across library branches, supported by collectionHQ. The implementation of these regular activities will result in overall collection performance improvements which can be easily monitored using collectionHQ Performance tools to ensure that EBSM is being used consistently system-wide. Non-improvements might suggest parts of the toolset which require more focus from staff or locations where further EBSM training is required.

Strategically, collectionHQ can help to identify those improvement areas and suggest the appropriate action to take. Incorporating the tool into your long term goals will get your library on track and soon you will notice the increased circulation, improved turnover and, importantly, enhanced customer satisfaction that collectionHQ can trigger.

CASE STUDY



saveTIME



saveMONEY



improvePERFORMANCE



The Indianapolis-Marion County Public Library, IN, is made up of 23 branches and has a collection of almost 1.2 million items. As featured on WISH-TV, the library made some surprising discoveries when first using collectionHQ in 2013. More than a quarter of the library collection had not circulated in 12 months and overall circulation had “plateaued” in the years prior to implementing EBSM.



collectionHQ evidence now supports strategic planning at the library, helping to plan budget around what materials are in demand and adjust spending appropriately on those items which are not circulating well.



San Francisco Public Library

As featured in **Library Journal** (September 2012), 27 branch library system, **San Francisco Public Library, CA,** subscribed to collectionHQ in 2011. Shellie Cocking, Collections & Cataloging Manager at the library told Library Journal that collectionHQ has helped to improve collection performance by putting the “control” of managing collections into the hands of the branches. This equates to a saving of \$95,000 from the avoidance of buying new items.





efficiencies



saveTIME



saveMONEY



improvePERFORMANCE

To investigate the overall performance improvements libraries can expect from implementing an evidence based workflow, we have researched the circulation and turnover improvements for each group in our sample. These figures are illustrated in the table below:

GROUP	CIRCULATION INCREASE (%)	TURNOVER INCREASE (%)
1	7%	12%
2	11%	9%
3	12%	11%
4	12%	11%
5	6%	9%

CONCLUSION

The key to future success of public libraries today is to reaffirm the role of the library at the heart of the community by encouraging patron support and proving to be a good ambassador of public spending. To develop this role, public libraries must endeavor to avoid wasted spend, make evidence based purchasing decisions and, most importantly, provide a collection that is reflective of what patrons want.

So what part does a methodology play in accomplishing this goal? Our findings have illustrated that Big Data, or evidence based analytics, can be incorporated into library workflow via the EBSM methodology. EBSM is a journey, not a destination, and collectionHQ is the vehicle which makes regular and sustained use of the methodology possible.

As a result, this evidence based tool will increase your library's return on investment year on year while continuously improving your patrons' experience.

collectionHQ is the vehicle which makes this workflow possible and as a result will increase your library's return on investment and improve the overall patron experience.

What is there to lose? Supercharge your collection with collectionHQ.



saveTIME

Staff time freed up to spend on value-add activities



saveMONEY

Budget that can be redistributed



improvePERFORMANCE

Increase circulation

GROUP 1

312 days

\$745,147

7%

GROUP 2

156 days

\$304,509

11%

GROUP 3

94 days

\$143,938

12%

GROUP 4

55 days

\$61,406

12%

GROUP 5

31 days

\$24,123

6%

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ⁱⁱⁱ <http://www.azlibrary.gov/libdev/programs-services-and-tools/arizona-public-library-statistics>

^{iv} Watson, J., 2012

^v <http://wishtv.com/2014/01/27/indy-library-facing-digital-divide/>

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