

# Collection Manager

Free Excel Spreadsheet for analyzing your collection at <https://db.tt/iUAhAuhj>

Download this spreadsheet now because the examples will be discussed in this PowerPoint.

- Presentation, June 4, 2014
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Collection Manager is a free Excel spreadsheet I created to analyze library collections. It is free at the Web address shown here.

## Why use Collection Manager?

Verifying your observations about collection use

Quantifying your observations

Discovering usage you may not have observed

Linking collection size, circulation and purchasing for a quantified response to collection use.

Since librarians observe what checks out and what doesn't check out, most librarians feel they know what is popular and what is not popular.

Though generally true, some of us may wonder how accurate our observations are.

Collection Manager tests the accuracy of our observations.

Furthermore, since the circulation of small collections is such a small portion of overall circulation, small collections may be underappreciated even by observant librarians and appear not worth supporting. Collection Manager can reveal which small collections actually have good circulation and are worth supporting.

Finally, Collection Manager's analysis links collection size, collection circulation and purchases for each collection to suggest what to weed and what to purchase.

So how does Collection Manager do this?

# How Collection Manager works

Example 1

Col. 0

Type numbers in columns 1, 2, and 3.

Automatic calculations in columns 4, 5, and 6.

Analysis and suggestions in columns 7, 8, and 9.

Col. 10

Collection size (New)	Circulation (Past 3 years)	Added to collection (Past 3 years)	Percent of total collection	Percent of total circulation	Percent of total added	Circulation percent (Col. 3) / Collection percent (Col. 4) Green = Additions percent (Col. 6) Buy / Red = Additions percent (Col. 6) Buy / Red = Additions percent (Col. 6) Buy	Circulation percent (Col. 3) / Additions percent (Col. 6) Green = Buy / Red = Buy	Turnover rate = (Col. 2 / Col. 1) Green = Buy / Red = Buy	Recommendations # of titles to buy this coming year.	
AUDIOBOOKS	340	688	120	3.76%	3.02%	3.82%	-0.76%	-0.80%	1.2	15
BBM	0	23	0	0.00%	0.12%	0.00%	0.12%	0.12%		1
EBOOKS	0	1	0	0.00%	0.00%	0.00%	0.00%	0.00%		0
ESPAÑOL	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%		0
FICTION	8,007	7,410	1,447	34.84%	33.18%	46.08%	0.34%	-13.90%	0.3	1,100
KIDSBOOKS	2,182	2,382	121	15.18%	14.06%	10.28%	-1.12%	-1.70%	0.8	142
LITERARY	175	330							1.8	28
MAGAZINE*	0	0								0
MOVIES	1,382	3,737							4.2	100
MUSIC	0	1	0	0.00%	0.00%	0.00%	0.00%	0.00%		0
NOFICTION	2,702	1,020	482	12.82%	4.84%	15.33%	-13.85%	-10.54%	0.4	152
ONLINE	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%		0
REFERENCE	26	7	4	0.29%	0.09%	0.12%	-0.39%	-0.39%	0.1	1
REGIONAL	126	31	34	1.27%	0.19%	2.08%	-1.07%	-0.94%	0.1	10
SOFTWARE	2	2	1	0.02%	0.02%	0.02%	0.00%	-0.02%	1.0	0
SPECIAL*										
VERTICAL*	1	0	0	0.01%	0.00%	0.00%	-0.01%	-0.00%	0.0	0
VIDEO GAME	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%		0
W	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%		0
YOUNG ADULT	2,112	1,307	127	14.72%	8.21%	3.18%	-6.51%	-6.30%	0.8	113
YOUTH	0	3	0	0.00%	0.01%	0.00%	0.01%	0.01%		0
Z	1	1,400	0	0.01%	8.87%	0.00%	8.84%	8.87%	1400.0	1
TOTAL	14,871	21,062	3,140	100.00%	100.00%	100.00%			1.0	1,000

See Example 1 of spreadsheet

## How Collection Manager works

Col 0: lists the collections, item types, or shelving locations to analyze. Chose the category type which covers all the circulating titles without overlap such that titles are being counted twice. Our regional catalog uses collections.

Col. 1: Use the report function on your automated system to measure the current size of each collection.

Col. 2: Use the report to measure the circulation of each collection during the past year.

Col. 3: Use the report to measure the number of titles added to the each collection during the past year.

The sum for each column appears at the bottom of each column.

Typing in the numbers for columns 1, 2, and 3 is all that is required. Formulas in each

cell automatically fill out the rest of the spreadsheet.

Cols. 4, 5, and 6 is the collection percentage of the totals at the bottom of columns 1, 2, and 3.

Collection Manager's analysis assumes meeting patrons' demand requires nearly equal percentages across columns 4, 5, and 6.

- High demand is linked to relatively large collections (column 4), high circulation (column 5), and buying more titles (column 6).

- Low demand is linked to a relatively small collections (column 4), low circulation (column 5), and buying fewer titles (column 6).

Cols. 7 and 8 measure the deviation from these two assumptions which lead to recommendations for weeding and buying more.

- Col. 7 measures the difference between collection size and the circulation of each collection.

  - When column 5 (circulation) is above column 4 (size), col. 7 is a positive number.

  - When column 5 (circulation) is below column 4 (size), column 7 is a negative number.

  - When the numbers in column 7 are above or below a threshold, the numbers are supposed to be colored to draw our eyes to those numbers.

    - Green means the collection is popular.

    - Red recommends weeding. The percentage could be interpreted as a suggestion of how much of the collection to weed.

- Col. 8 measures the difference between circulation and the buying supporting the collection.

  - When column 6 (buying) is above column 5 (circulation), the number in column 8 is a negative number. Since purchases exceeded circulation, demand, buying fewer titles is recommended.

-- When column 6 (buying) is below column 5 (circulation), the number in column 8 is a positive number. This suggests purchases may not meet demand over time. Buying more titles is recommended.

-- Column 8 has two red circles around red numbers. Arrows point to green numbers. This illustrates the idea that future purchases should shift from red numbers to green numbers. Column 9 may affect this interpretation.

Column 9 is circulation turnover calculated by dividing the yearly circulation in column 2 by the collection size in column 1. This provides a second opinion of the recommendations in columns 7 and 8.

- Compare the red, circled numbers in column 8 with the turnover rates in column 9.

-- In column 8, the top number, -10.90%, is for fiction. The bottom number, -10.54%, is for non-fiction.

-- In column 9, the fiction turnover rate is a healthy, green 1.5. The turnover rate for non-fiction is an unhealthy, red 0.4.

-- Even though column 8 suggests buying fewer fiction and non-fiction titles, the fiction turnover rate of 1.5 suggests that fiction should continue to be purchased at the same rate. The red turnover rate reinforces buying fewer non-fiction titles, possibly focusing on those Dewey sections with the best circulation.

-- A high green turnover rate can also reveal support for a small collection. In column 5, large print is only 2.5% of total circulation. Library staff watching only circulation checkouts could get the impression that large print is not very popular and doesn't deserve support in the future. The green 3.0 circulation turnover rate, however, clearly shows that large print does circulate well for a small collection. Buying more titles is a good investment for future purchasing.

Column 10 actually recommends how many titles in each collection to purchase during the coming year.

- These recommendations are based on the total number of titles purchased last year, i.e., the total at the bottom of column 3. Since this number is not the exact number of titles that will be purchased in the coming year, column 10 recommendations are ball-park suggestions.

- Comparing the suggestions in column 10 with the actual number of purchases in column 3 will show the radicalness of some of the purchasing suggestions.

Collection Manager, like any use of data, is subject to the cliché of garbage in, garbage out. So let's discuss issues about garbage data.

## Taking out the garbage

Collection Manager's recommendations rely on a good catalog with good records.

Make sure the catalog does not contain records for titles that no longer exist in the library.

Make sure that each record is linked to a collection, item type, or shelving location, whatever categories you are measuring.

### Taking out the garbage

Collection Manager's suggestions and recommendation rely on accurate counting of titles in collection size, circulation and added titles reports.

Inaccurate counting happens one of two ways.

- Many years ago, CKLS libraries participated in a statewide catalog. When titles were weeded from libraries, librarians were supposed to remove their holdings from this statewide catalog. If they did not, the catalog record continued to claim the library had titles no longer on the shelf. When these records were harvested for the new regional catalog, the new catalog still had these records. Reports of collection size counted titles no longer on the shelf and could not circulate. This would distort column 7 and column 9 measurements comparing collection size and circulation.

- When catalogers do not take the step of connecting each catalog record to the collection, item type, or shelving location, the report undercounts collection size, circulation, or added titles.

- These flaws are discovered by doing reports searching for:
  - Titles without bar codes. Check to see whether each title without the barcode is on the shelf. For each title found, add the barcode and the collection, item type, and shelving location. For each title not found, remove the catalog record from the catalog.
  
  - Records with nothing for collections, item types, or shelving locations. Add the collection, item types, or shelving locations in each record.

Making these corrections will improve counting.



## **Just a magnifying glass, not a guru**

Use Collection Manager to stimulate your thinking about your collection.

Collection Manager should not be used as a substitute for thinking about your collection.

Thanks for listening and reading.

Send comments and suggestions to Chris Rippel at [crippel@ckls.org](mailto:crippel@ckls.org)

Just a magnifying glass, not a guru

Collection Manager is not a guru. Its suggestions and recommendations should not be accepted without question.

Collection Manager is a magnifying glass focusing on collection use.

You still need to interpret what you see.

One intelligent librarian disliked Collection Manager's because of the suggested link between circulation and demand for the type of material in a collection.

She pointed out that a collection might have low circulation because the titles are poorly located in the library or the titles were poorly selected or are out-of-date, etc. Moving the titles to a new location or selecting better, newer titles might have a strong demand and increase circulation. I agree completely.

I would add, however, that Collection Manager can help investigate the causes of low

circulation: low demand for this type of titles or poorly selected titles. Let's see how this would work.

- When circulation is low, Collection Manager recommends weeding the collection. This should be followed unless library staff thinks low circulation has some other cause than low demand for the titles.

- If library staff suspects low circulation is caused by bad shelving location, titles should be moved to a better location.

- If library staff suspects low circulation is caused by bad titles, buy new titles that may have better circulation.

- Next year, use Collection Manager to determine the turnover rate for these new titles.

  - If low circulation was caused by bad location or bad titles and the original situation was changed, column 9 should show an improved circulation turnover rate.

  - If low circulation was caused by low demand, column 9 should continue to show a low circulation turnover rate and the titles should be weeded as the original suggestion states.

Thank you very much for listening and reading.

Please send any comments and suggestions to [crippel@ckls.org](mailto:crippel@ckls.org)