

Directors' Digest

SHARING INDUSTRY INSIGHT WITH LIBRARY DIRECTORS WORLDWIDE

Increasing Efficiencies in Selection

PAGE 4

Plus:

What's the future of
public libraries?

PAGE 9



Index

3 – **Welcome** – A Message from Scott

4 – **collectionHQ Investigates** – Increasing Efficiencies in Selection

7 – **Scheduling Module**

8 – **Director Spotlight** – Steve Hardman, Swansea City and Borough Council

9 – **Industry Insight** – What's the Future for Public Libraries?

12 – **Partner Focus** – Nielsen

14 – **Case Study** – collectionHQ helps to save money at San Francisco Public Library

15 – **Upcoming Events**

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Welcome

A MESSAGE FROM SCOTT

Hello, and welcome to the first issue of *Directors' Digest* from collectionHQ.

We're delighted to be back with the second edition and I'd like to say a special "thank you" to many of our readers who shared feedback about our last newsletter. We have taken your comments on board and we hope you will find these reflected in this issue.

A topic which remains subject to much debate among Library Directors is how to increase efficiencies in collection management and development tasks. Our collectionHQ Investigates feature will explore this debate with a focus on increasing efficiencies in the selection process.

In our Industry Insight section, we consider the future of public libraries and the suggestion that public libraries should be reimagined as: "a gathering of people, rather than a collection of books."

Finally, we are delighted to share a case study from the San Francisco Public Library in California, where smarter purchasing decisions have been made a possibility thanks to evidence based techniques.

With all this and much more, I hope you enjoy our latest edition of *Directors' Digest*. Don't forget to share your views with us at **more.**

info@collectionhq.com.



Scott Crawford

COLLECTIONHQ VICE PRESIDENT
AND GENERAL MANAGER





INCREASING EFFICIENCIES IN SELECTION

Improving selection to enhance the patron experience relies on one key factor: the alignment of material supply with demand. 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.

Further efficiencies in selection can be achieved with initiatives such as vendor selection which, if introduced and managed properly, can offer libraries significant opportunities to streamline the selection process and cut out unnecessary cost. Recent developments in vendor selection which support patron driven acquisitions continue to improve selection decisions and efficiencies which together can complement the local demand provision that a professional librarian can offer.

ALIGNING SUPPLY WITH DEMAND

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 materials’ cost and staff time to select the most appropriate material, the opportunities to remove waste and cost from this function are considerable. Use of an evidence based approach can reduce the opportunity for local selection decisions to result in a wasteful purchase.



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 percent of check-outs from holds against 85 percent of check-outs from browsing, considering both types of circulation is essential. Delving more deeply into holds, how can you monitor your holds demand in comparison with current holdings? Do you have enough items in your collection to meet the holds requests?

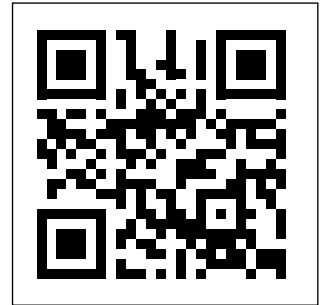
collectionHQ's 'holds: holdings' ratio provides a solution and reveals the locations where the most holds are placed. The ability to monitor your library's number of holds in relation to holdings helps to identify any gaps in supply and guide selection to align that supply with holds demand. What's more, 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.

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.

Creation of an evidence-based 'Spending Plan' which cascades a library's annual material budget through locations, titles, genres, authors and formats can help to deal with this issue head on. Once your budget has been allocated with evidence, adjustments can be made before finalizing your spending plan. Using an evidence based tool like collectionHQ will significantly save time by carrying out the number crunching part of the process and will support the avoidance of wasteful spend on areas that have little evidence of circulation.



Click on the QR code to find out more about ESP.

EVIDENCE BASED SELECTION

Once your material budget has been allocated accordingly, it is important to continue using evidence when making selection decisions throughout the fiscal year by creating detailed selection specifications by genre, subject, author, publisher, series and format. These specifications should be available for print, 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.

THE FUTURE

With collection development librarians faced with the task of determining which titles will perform well while making sensible use of library funding, it's no surprise that evidence is shaping the future of selection at public libraries. Applying evidence to the creation of spending plans can place a public library in a prime position to practice vendor selection.

Around the world, many public libraries have been working in partnership with their materials vendor on selection by 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, but it also remains vital, 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.

New developments in vendor selection are supporting performance monitoring, but also streamlining the application of evidence-based analytics to the practice. The latest development in vendor selection is the introduction of “predictive analytics” to the practice. Applying predictive analytics to vendor selection requires a scientific approach to identifying top titles and ensuring they are selected in the right quantities, for the right locations. To complement this science, we need the “art” of vendor knowledge about collection development and upcoming titles.

A service already specializing in predictive analytics is ESP — Evidence-based Selection

Planning, by collectionHQ and Baker & Taylor. ESP provides a decision support system which encompasses masses of historic circulation evidence ranked in order of predicted demand from collectionHQ, and the collection development expertise of Baker & Taylor’s collection development team who can apply knowledge and experience to predict trends.



NEW

Scheduling Module

THE CHALLENGE:



Less time.



Less staff.



Higher expectations.

THE SOLUTION:

Your management team needs a robust method to manage staff completion of vital collection management and development activities. The Scheduling Module from collectionHQ is a set of revolutionary new tools which will allow library managers to assign tasks to staff members on a branch and system wide level, monitor task completion, and importantly visualize the benefits and results of their efforts.

COMPLETE CALENDAR VIEW

Assign tasks and stay on top of monthly plans.

NEVER FALL BEHIND ON TASKS AGAIN

Library managers are notified when a task is complete or overdue.



For more information about the Scheduling Module, please contact more.info@collectionhq.com.



Steve Hardman

Swansea City and Borough Council
Libraries (United Kingdom)



When did you first decide that you wanted to work in public libraries?

I fell into libraries quite by accident. I was made redundant from the Coal Board and took a temporary job with Blaenau Gwent Libraries working on their new library management system. The rest as they say is history.

What do you enjoy most about your role as Library Services Manager at Swansea City and Borough Council Libraries?

I love talking to customers and listening to all the positive feedback I get about our library service. Libraries make such a difference to so many people.

Who is the most popular author at your library at the moment?

James Patterson

What do you consider to be the 3 main challenges facing senior management in public libraries today?

- Ever increasing reductions in our budgets
- Political perception about libraries
- Customer perception about libraries

Over recent years, the library world has been influenced by a number of key factors. What do you consider to be the key trends shaping the library world as we know it?

The internet and electronic resources have had a huge influence on the way customers use libraries. Also challenges from other sectors, such as vastly discounted books from Amazon and ebooks.

How is your library using 'Big Data' to improve collection performance?

Since using collectionHQ, our libraries are now getting the transfers that they want and the books are in the right library. My stock manager loves it as she is able to see at a glance what the stock gaps are and has evidence to back her selection rather than guess work and hearsay.

What projects are you most excited about working on over the next year?

Unfortunately, I don't feel I have any exciting projects to work on in the next year. All the projects are politically motivated and in line with budget reductions



WHAT'S THE FUTURE FOR PUBLIC LIBRARIES?

As with all public services, libraries have been hit hard by the global recession. Government funding provided to public libraries in many states across the United States has only recently started to pick up; certain states in Australia¹ have cut public library funding, placing more pressure on local councils; and in the United Kingdom, continued library closures and budget cuts pose a serious threat to the future of public libraries. The case of U.K. public libraries in particular has received worldwide coverage of late. An independent report published in December 2014 has outlined that, since 2009, there are “337 fewer libraries and nearly 5,500 fewer (library) staff²” across the United Kingdom, and suggests that U.K. public libraries must be reinvigorated to survive.

So, how can we begin to remedy the problems facing U.K. public libraries? First, we must understand the reasons behind the crisis, and it's not all down to funding. You could argue that falling numbers of library members gives reason for local councils to doubt whether investing in libraries is sensible use of public funds. On the other hand, less investment causes enticing new members and raising the profile of the library within its community to be more arduous than ever.

Evidence that investing in public libraries generates new visitors comes from the recent opening of the 'Library of Birmingham,' a £189 million building with a collection of more than 1 million books. The opening of this new library welcomed crowds of visitors to its location, Centenary Square in Birmingham.³

A modern new library you may argue would be expected to yield crowds, but how do you maintain crowds? And importantly, without this level of investment, how do you attract crowds in the first place?



The Library of Birmingham in the United Kingdom

¹ <http://nswpla.org.au/nswpla-communityfunding.html>

² <http://www.cilip.org.uk/cilip/news/sieghart-report-public-libraries-convincing-roadmap>

³ <http://www.bbc.co.uk/news/uk-england-birmingham-23934792>



APPEAL TO YOUNGER MEMBERS

Securing the future of the public library relies on securing younger members; however, the key challenge with this approach is the falling number of young people reading books with a recent report from *Scholastic* claiming that the frequency of reading actually falls as children enter teenage years.⁴ So how do we encourage young people to use a library if its key offering — its books — are not as appealing to them as before? We shouldn't assume that children don't want to read, but rather accept that traditional literacy has evolved.

Technological advances mean that youth today is faced daily with a variety of digital channels from which a wealth of information can be accessed in real time. Libraries can accommodate this trend by

providing digital services to young people, a trend which is making progress in the United Kingdom with loaning of ebooks up 80%.⁵

Other ways to encourage young people to go the library is to offer a location where they can “hang out.” Granted, libraries should not neglect to offer a quiet place for all patrons to read, but instead create zones where young people can explore digital content with friends perhaps over a coffee.

Sharing ideas on how to attract young people to the library can seem simple, but libraries must consider cost when it comes to change and innovation doesn't always come cheap. Library directors must consider the funds they have available and select appropriate actions to take. Staff members must also

⁴ <http://www.forbes.com/sites/jordanshapiro/2015/01/30/ordinary-kids-read-as-infrequently-as-ordinary-adults-less-than-5-books-per-year/>

⁵ <http://magazine.good.is/articles/public-libraries-reimagined> ⁸ <http://readingagency.org.uk/news/blog/a-library-book-vending-machine.html>

be encouraged to think commercially and digitally which can be accelerated by attracting graduate employees and volunteers who are dynamic and savvy when it comes to digital. Digital expertise can be enhanced by using an evidence based mechanism like collectionHQ which helps to monitor trends across digital formats and make decisions on how to get the most from digital collections.

PROVIDING COMMUNITIES WITH A SERVICE

In addition to being commercially aware and knowledgeable about technology, librarians must also continue to do what they do best: support their communities.

Members of the community depend on their local library as a provider of information and a supplier of services which may not be readily available to them elsewhere. Research carried out by *Library Journal's* Meredith Schwartz found that about 17% of the United Kingdom's population does not have access to efficient Wi-Fi. As more and more utilities become available online and with the rise of "technomadism," where freelance workers move from city to city, citizens need access to fast and reliable internet. Community needs could further be supported by developing the library as a civic hub where patrons have the option to pay bills, find out information about their community, and address local issues. Such a movement helps to reinforce the library's position at the heart of its community.

Unfortunately, falling budgets have resulted in only a third of libraries in England offering Wi-Fi⁶ and reduced library opening hours which cause libraries to struggle to meet the needs of their communities.

Overcoming cuts is a long and tedious process, but by demonstrating to boards that savings are being made and the library is running efficiently, library directors can begin to invest funds in the places that count. For example, by identifying areas of overspend and adjusting budgets accordingly; freeing up staff time allowing them to spend more time planning community projects; and developing waste reduction initiatives with an evidence based tool like collectionHQ.

DON'T FORGET LOYAL PATRONS

Providing a service to the community and attracting younger members is essential to the future of the library, but no more than ensuring that loyal and long-standing patrons are not forgotten about along

the way. Regular patrons are the foundations of the public library and their support has been demonstrated through the numerous campaigns set up across the United Kingdom and the world against library closures.

Loyal patrons are the biggest advocates of public libraries, helping to encourage new members and fight against library cuts; for this reason they are essential to the future of the library and require a high level of service with access to the books they want, when they want.

Matching supply with demand need not be impacted by changes to budgets; it can be achieved by really knowing your collection and planning based on evidence of circulation. The use of a tool which translates big data into action plans can help to alleviate shortages and redistribute surplus items by encouraging libraries to move items from branch to branch according to demand; therefore the purchasing of new books is not necessary.

CONCLUSION

As one article suggests, public libraries need to move forward: "reimagining the library as a gathering of people, rather than a collection of books."

Reinventing the library with cuts ongoing is a scary thought for library directors, but it doesn't need to be. Staff empowerment and use of an evidence based methodology helps not only to attract new members, support communities, and retain loyal patrons; but can be used to demonstrate efficiencies when securing future investment in the library.

YOUR THOUGHTS?

Have you read the Sieghart report or has your library introduced initiatives to better position the library as a community "hub"? Please send your views to our editorial team at more.info@collectionhq.com and we will feature in our next newsletter.

⁶ <http://www.telegraph.co.uk/news/uknews/11299758/Thirsty-Go-to-a-library-not-a-coffee-shop.html>



COLLECTIONHQ HELPS SAVE MONEY AT SAN FRANCISCO PUBLIC LIBRARY

San Francisco Public Library is a 28 branch system with five bookmobiles serving a population of more than 800,000. Implementing regular weeding and gaining more granular knowledge of the collections to improve collection management were priorities for management at the library. Management was also intrigued by the possibilities of gaining more use of existing collections via the transfer process. collectionHQ was implemented at the library in November 2011 to help with those goals



THE CHALLENGE

Before implementing collectionHQ at San Francisco Public Library one of the key challenges was coordinating system wide weeding procedures across 28 branches. Collections & Cataloging Manager Shellie Cocking explains that “we did have detailed weeding guidelines, but no way to track how people were following them and what condition their collection was in.” Although weeding lists could be manipulated from the library’s ILS system, Millennium, these were not efficient to run and not all staff were comfortable creating and using them.

Another difficulty was creating a streamlined process for transferring items from branch to branch which was considered an effective means of saving money by making the most of available materials. The process before collectionHQ was to send those items classed as dead to a central “redistribution” unit, or to offer them via email to other locations. However Cocking said both of these processes were inefficient and the redistribution unit option required staff to compile a list of what they needed monthly then travel to that central location.

Management was intrigued by collectionHQ after hearing about the product through the Urban Library Council and attending a seminar at an ALA Conference. Then following a recommendation from the library’s ‘Collection Committee’, a group made up of librarians from across the branches, administration decided to take on collectionHQ to overcome those challenges.

THE OUTCOME

STREAMLINED PROCESSES |

Complicated weeding and transfer processes at San Francisco Public Library have been eliminated thanks to the help of collectionHQ. Detailed reports on what dead and grubby materials should be removed from or transferred within the collection can now be pulled directly by staff which will allow Cocking and team to implement a regular weeding schedule which they can monitor on an ongoing basis.

Cocking describes this new and improved process: “Grubby refresh is great and that’s where we can see that we are saving money because people don’t pull the dead items until they know that everyone has had a chance at them. I just love now that we can set standards, have a schedule and I can track them all.”

collectionHQ has also helped to improve the process for managing the floating A/V collection at the library. As an urban system with most patrons in transit, staff find that a lot of holds for A/V material are placed at those branches close to the subway or the grocery store which is where they are subsequently returned. Cocking explains that this “collection drift” means material may then not move from those branches for a long period of time. She goes on to describe how collectionHQ has helped with this challenge “we set collection checks at every 60 days so that anything which hasn’t circulated in 60 days they (the staff) look for it. If they find it they offer these up to other branches.” The staff also use “dead item refresh” to identify any items which circulated well until they reached that branch. Cocking comments “We use those reports to move those items along.”

FINANCIAL SAVINGS | As implementation of collectionHQ proceeds, San Francisco Public Library is beginning to better target its collection’s budget and achieve higher use of its existing collections because of better weeding, transfer processes and the avoidance of wasteful purchases facilitated by collectionHQ reports.

Cocking describes a project in which the library used collectionHQ to focus spending better on those popular yet under-represented areas. “We do an annual survey asking branches what they think of the collection and which areas they feel they need more material in. We purchase by committee so branches don’t select individually.” The consensus amongst staff in this case was that the travel section was under-stocked and so Cocking ran system-wide reports from collectionHQ to see which countries each branch was lacking in. With the information from these reports, Cocking outlines that she “has created a chart for the committee when they are gridding for branches and this included the turnover rates in travel areas that we keep internally from what the branch staff said.” The committee can then buy books based on the evidence from collectionHQ combined with branch feedback and cancel standing orders for the items they don’t need.

demo@collectionhq.com | www.collectionhq.com

Overall, when reflecting on the financial savings made with the help of collectionHQ, Cocking comments “I think it pays for itself very quickly, that’s the nice part about it. You save more than you spend on the product.”

PERFORMANCE IMPROVEMENTS | Overall collectionHQ has supported the improvement of the collection performance across San Francisco Public Library thanks to supplying reports for the clean-up of dead and grubby materials as well as providing better insight into patron demand.

In terms of the collection clean up, since implementing collectionHQ, Cocking highlights the better physical condition of books in the library which can be seen from the 26% reduction of the grubby list at one branch, which historically had struggled to get rid of poorly performing items.

As for development of the collection more in line with patron demand, Cocking provides the example of improved allocation of budget to nonfiction material “We have a healthy collection budget and spent a lot of that on nonfiction last year but this is mostly overstocked so we are using this information in the committee to cut down on the areas that don’t show as under-stocked and how many titles we are purchasing for nonfiction.” By managing the budget this way based on collectionHQ evidence the library can now justify buying less of what patrons aren’t checking out and more on those items which the software proves has a high circulation.

The positive results of using collectionHQ to develop and manage the collection are not only felt by staff but can be seen from improvements in circulation. collectionHQ reports drawn from the performance of the first seven branches where the software was rolled out revealed that the transfer of 139 books which had been dead on an average of 12 months have now received an additional 163 circulations.

Cocking is delighted with this result and looks forward to watching this trend of improvements continue across the library system!





NIELSEN BOOK – A ONE-STOP SHOP FOR CONSISTENT DATA QUALITY

Knowing how to develop your collection is about knowing library trends. That's why Nielsen Book – the leading provider of search and discovery, commerce solutions, consumer research and retail sales analysis services – continues to support libraries and retailers globally by supplying timely, accurate information in the most efficient and cost-effective manner.



With a presence in 100 countries, Nielsen Book aggregates metadata from international publishers, allowing libraries to streamline and handle large volumes of metadata to find current; forthcoming; and out-of-print titles that can be overlooked by suppliers. Moreover, Nielsen Book prides itself on aggregating data to very high standards; curating and standardising data including the addition of a range of relevant and appropriate subject classifications including Thema, the new international classification scheme which is being adopted worldwide and is now included on every title on the Nielsen Book bibliographic database which currently has over 25 million records.

collectionHQ welcomed Nielsen Book, to exhibit at the collectionHQ UK Forums in 2014 and 2015 in London, where one lucky librarian won an e-reader from Nielsen Book's prize draw. Speaking of the partnership, Ian Downie, Director, International Business Development commented: "Nielsen Book is a firm partner of collectionHQ and it was a pleasure



to announce the company as sponsor of the collectionHQ UK Forums in both 2014 and 2015."

So what lies ahead for Nielsen Book in 2015? As funding in the sector becomes tighter, the company will work hard to remain relevant to customers by ensuring the quality of the data collected and aggregated remains of the highest standard, and is current and content-rich. Nielsen Book is also offering new services such as Book2Look, a dynamic search inside tool which harnesses the power of social media to create attention around any title using the Nielsen Book2Look book widget.

Simon Skinner, Sales Director, Nielsen Book Discovery Services, commented: "Nielsen Book values this partnership with collectionHQ because of their customer focus and their truly innovative service development. We look forward to partnering with them in the months and years ahead."

Upcoming Events



April 16 | Austin, Texas

collectionHQ TxLA Forum 2015

Attending the TxLA Conference 2015? If so, be sure to join collectionHQ users and Account Manager, Norene Allen, for a day of discussion around evidence-based practices and getting the most from collectionHQ. Find out more and register today at <https://chqtxlaforum2015.eventbrite.com>.

April 21 | Worthington, Ohio

collectionHQ Mid-Ohio Spring Forum 2015

Hosted by collectionHQ Account Manager, Randy Boecker, attendees will have the opportunity to share experiences with other collectionHQ users and to discover upcoming collectionHQ developments. Find out more and register here <https://chqmidohioforum.eventbrite.com>.

April 23 | Lethbridge, Alberta

collectionHQ Western Canada Forum 2015

collectionHQ Account Manager, Kristen Becker, invites collectionHQ customers and non-customers to discover the latest collectionHQ news and to discuss experiences of using evidence-based practices. Find out more and register here <https://chqwesterncanada2015.eventbrite.com>.

May 21 | Hudson, Ohio

collectionHQ N.E. Ohio Forum 2015

Meet with other libraries using collectionHQ to share hints, tips and experiences of using evidence-based techniques at our Forum hosted by Randy Boecker. Find out more and register here <http://chqneohioforum2015.eventbrite.com>.

June 3 | Exeter, United Kingdom

collectionHQ South-West U.K. Forum 2015

SAVE THE DATE! collectionHQ Account Manager, David Bishop, will host a forum for libraries in the South-West United Kingdom at the Exeter Library. This will be a perfect opportunity to discuss evidence-based practices with libraries from this region. More details to come.

June 26 | San Francisco, California

collectionHQ ALA Forum 2015

Join collectionHQ customers from across the United States for the collectionHQ ALA Forum 2015. This forum will feature presentations about recent and upcoming enhancements and a series of round table discussions. Find out more and register here <https://chqalaforum2015.eventbrite.com>.



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