



CASE STUDY

MID-COLUMBIA LIBRARIES
collectionHQ TRANSFERS



save**TIME**



save**MONEY**



improve**PERFORMANCE**

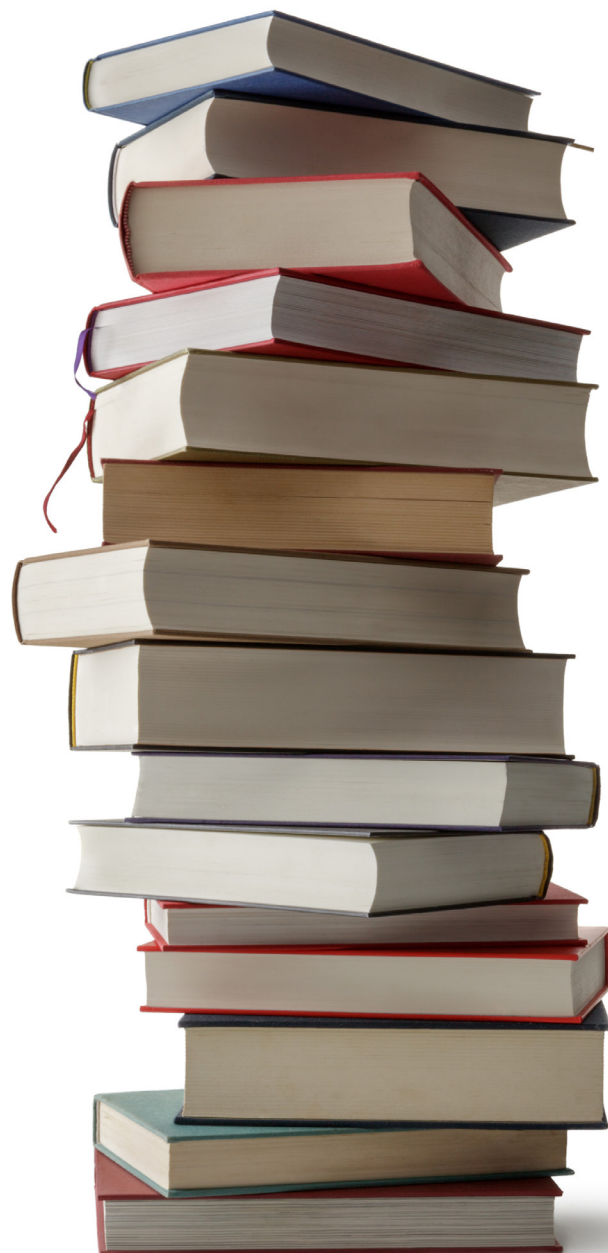


MEETING THE GOALS

On adopting collectionHQ, Michael and the team were able to pinpoint the parts of the tool that could be used to achieve the library goals.

COURTESY & EXPERTISE

collectionHQ's Transfer tool was introduced to help to: "Meet demands and needs of individual communities". Michael explained: "Transfers allow you to submit data to accumulate information on what is going on so you can understand the difference between branches and identify where there is demand."



Mid-Columbia Libraries, WA is a 12 branch library system serving a population of 196,000.

GOALS

Mid-Columbia Libraries' mission statement is to: "Enhance quality of life by providing excellence in books and services for our residents and communities."

Prior to implementing collectionHQ, the team at Mid-Columbia Libraries introduced some key goals in line with their mission statement to maintain high standards and to improve performance.

1. Courtesy & Expertise

- Meet demands and needs of individual communities.

2. Appearance

- Establish standards across all libraries.
- Reduction and elimination of unwanted and unused materials.

3. Efficiency

- Eliminate waste, better use current materials and collection budget.

While the goals were agreed across the staff, an evidence based solution was required to achieve them and so collectionHQ was introduced to the library in 2010.

Michael Huff, Collections & Services Director explained: "We chose collectionHQ to automate what we were doing by hand and to share responsibility among the branches. Although we had adopted centralized selection, collectionHQ gave us an opportunity to get the branches more engaged."

Transfer Roll Out

Before applying the Transfer tools, the libraries' Collection Check percentage was reviewed. Due to good control over lost and missing items, very little work to lower the Collection Check percentage was required and so Michael and the team rolled out Popular Author and Popular Subject Transfer tools within the first 2 months of getting started with collectionHQ.

Michael demonstrated caution at first when introducing the Transfer tools. He described: "We started collectionHQ internally with myself and one other staff to begin with. Once we were comfortable and seeing the results, we began to train and get individual branch staff on board."

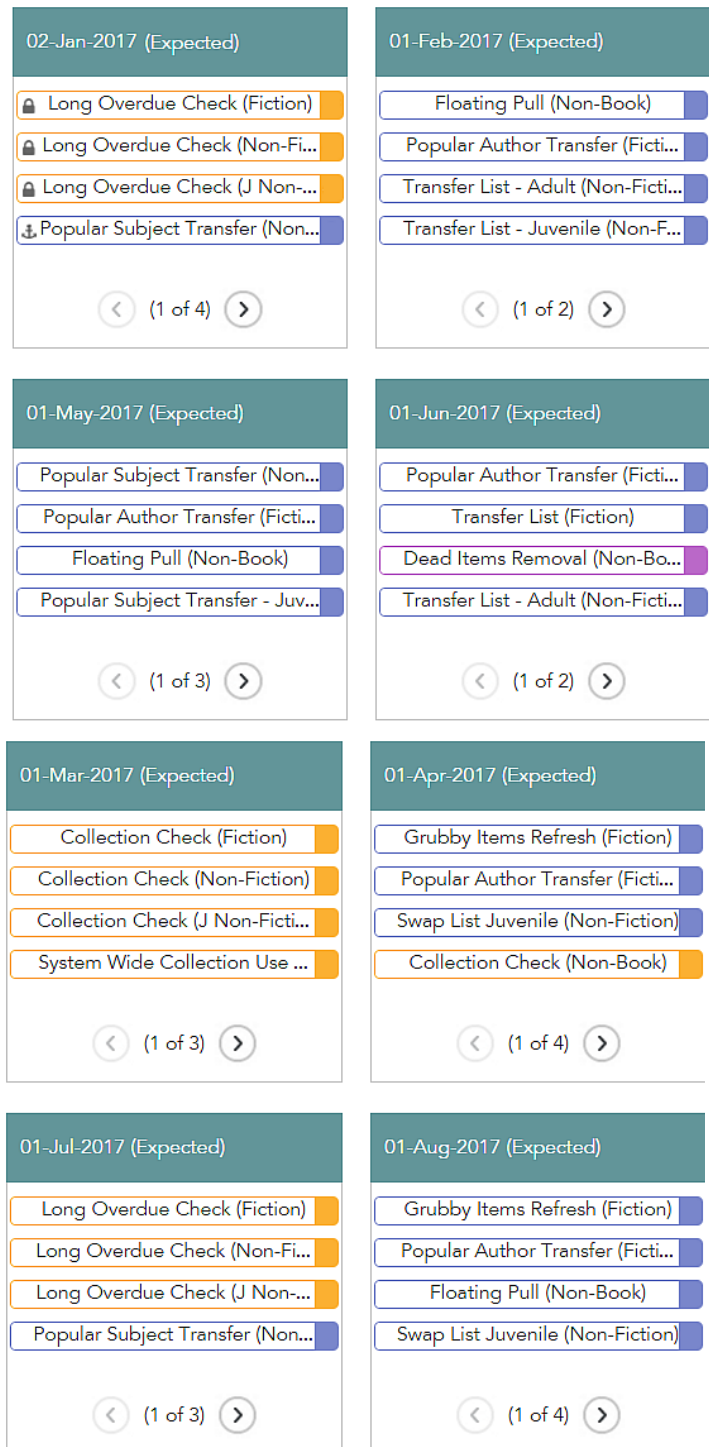
The first training sessions were delivered face to face in one on one situations. This approach supported the seamless roll out of collectionHQ from central to branch staff and was followed up with occasional group training sessions. After completion of training, individuals were encouraged to use the 'Help & Training' videos in Academy when working with collectionHQ as well as attend training webinars hosted by collectionHQ Account Managers.

Transfers Today

Today, Michael uses the collectionHQ Schedule Management Tool to plan and to monitor the progress of collectionHQ Transfer tasks. The schedule also sends reminders to staff to help them keep on top of Transfer tasks.

- Popular Author Transfer (Monthly)
- Popular Subject Transfer (January, March, May, July, September, November)

Michael commented on how the Transfer tool has helped with Fiction and Non-Fiction: "With Fiction we got enough copies to meet demand for holds but with collectionHQ, we were able to see top authors at individual branches. Things might sit at one branch with no action, but transferring and setting targets in collectionHQ allowed us to get additional circulations out of those items. Non-Fiction (tools) allowed us to highlight finer detail on what each community is reading and to see with floating where items get stuck and where they need to go."



APPEARANCE

At Mid-Columbia Libraries, weeding tools have been used in conjunction with Transfers to maintain a suitable appearance and to establish standards across all libraries. Michael said: "We see shelf space as prime real estate so we want to make sure that those books on our shelf are pulling their weight."

collectionHQ's Grubby Item Removal and Dead Item Removal tools for Fiction and Non-Fiction books are scheduled to be used in January, May and September. Refresh tools for Grubby and Dead Items are applied in April, August and December. Between those times, the team regularly applies Collection Check and Long Overdue Check, and will apply Dead Item Removal/Refresh for Non-Book items once a year. Regular use of the Removal and Refresh

tools have helped to maintain appearance of the collection by reducing and eliminating unwanted and unused materials. Michael shared: "Dead and Grubby Definitions have changed drastically over the year, getting more refined than since we implemented." In addition to applying collectionHQ weeding and Transfer tools, Michael also uses Conditional Weeding and Polaris Shelf Space Capacities to maintain appearance.

TARGETS AND PARAMETERS

Michael chose to change some of the default Targets provided in collectionHQ Administration, to accommodate collection management at the library.

Fiction and Non-fiction

- The Item Movement Transfer (days) default value of 90 was maintained while the Item Movement Transfer (uses) was decreased from 30 to 20. Michael explained: "We did not want to fill transfer needs with heavily used items and so lowered it to only pull items with less than 20 circs. This has worked well for us".
- Dead Items Definition (Days) and Long Overdue Definition (days) were both changed from 180 to 548, however there were variations across some of the branches. Michael described: "Dead really depends on the branch and our current shelf capacity and space. This has worked well adjusting in some of our branches depending on size."

- Grubby Items Cumulative Use Definition increased from 40 to 55. Michael was able to increase this target thanks to the library's "auto-renewal" function which renews items that do not have a hold on them up to two times therefore reduces wear on many of the items.
- Grubby Items Target Maximum Percentage decreased from 10% to 2.5%. Michael explained the reason: "We liked where we got to and felt like we could continue to improve the appearance of our collection by reducing down to the lower number."

Non-Book

- Targets set for the Non-Book collection varied with Item Movement Transfer (days)








reducing from 90 to 60 and Item Movement Transfer (uses) increasing from 30 to 99. This change proved to be effective for the library's CDs and DVDs which are regularly cleaned therefore can be used for a longer period.





















Since setting up collectionHQ, these Targets have remained largely static with some minor changes for specific branches, demonstrating the flexibility offered by collectionHQ.

- Grubby Items Cumulative Use Definition which has increased to 150.

Example of Targets for Non-Fiction

Name	Value		Default to:
Average Non-Fiction Book Price	15		
Dead Items Definition (days)	548		<input type="text" value="180"/>
Overstocked Target Percentage	80		
Understocked Target Percentage	30		
Rebalance Transfer Definition (days)	1		
Grubby Items Cumulative Use Definition	55		<input type="text" value="40"/>
Grubby Items Target Maximum Percentage	2.5		<input type="text" value="10"/>
High Use Purchase Threshold (uses)	20		
Long Overdue Definition (days)	540		<input type="text" value="180"/>
Monthly Rebalance Amount	100		
Number of High Use Items For a Single Purchase (copies)	5		
Number of Understocked Items For a Single Purchase (copies)	5		
Collection Check Definition (days)	1460		
Item Movement Transfer (days)	90		
Item Movement Transfer (uses)	20		<input type="text" value="30"/>
Collection Use Time Frame (Datasets)	24		<input type="text" value="60"/>
Target Swap Percentage	30		

Example of Targets for Fiction

Name	Value		Default to:
Average Fiction Book Price	15		
Dead Items Definition (days)	548		<input type="text" value="180"/>
Dead Items Target Maximum Percentage	5		<input type="text" value="10"/>
Rebalance Transfer Definition (days)	1		
Grubby Items Cumulative Use Definition	55		<input type="text" value="40"/>
Grubby Items Target Maximum Percentage	2.5		<input type="text" value="10"/>
Long Overdue Definition (days)	540		<input type="text" value="180"/>
Monthly Rebalance Amount	100		
Number of Popular Authors	100		
Number of Standing Order Popular Authors (Adult)	1000		
Number of Standing Order Popular Authors (Junior)	1000		
Number of Standing Order Popular Authors (Teen/YA)	1000		<input type="text" value="100"/>
Popular Author Target Minimum Percentage	30		<input type="text" value="25"/>
Popular Author Time Frame (Datasets)	12		
Standing Order Trend %	10		
Collection Check Definition (days)	1460		
Item Movement Transfer (days)	90		
Item Movement Transfer (uses)	20		<input type="text" value="30"/>
Collection Use Time Frame (Datasets)	24		<input type="text" value="60"/>
Collection Use Tolerance Level (%)	0.2		

EFFICIENCY

The third goal laid out by Michael and the team at Mid-Columbia Libraries was to create efficiencies with collectionHQ so that they could:

1. Increase circulation with fewer items
2. Allocate more funds to high demand items and make more informed purchasing decisions.

Michael shared: “We schedule lots of collectionHQ tasks and this has paid off in the time and money we have saved, allowing us to purchase new collections for new branches and to expand our digital collection.” Efficiencies gained by scheduling regular tasks in collectionHQ have been demonstrated by the ability to complete goals with a smaller staff. So, did collectionHQ help to achieve the goals laid out through increased efficiencies?

Increase Circulation with Fewer Items

As a result of careful roll out of the EBSM methodology and working consistently with collectionHQ, Mid-Columbia Libraries have achieved phenomenal results.

Fiction:

- Transferred 16,044 items over 2 years
- The average title was Dead for 7 months before transfer
- This has generated 79,773 additional circulations from Dead Items
- That’s turned \$160,440 worth of Dead Stock into Active Stock (based on \$10/item)

While the results are impressive, Michael and the team really wanted to know the impact of setting out these clear goals on patron satisfaction. To find out, the library coordinates feedback surveys regularly which have revealed that over 90% of customers feel their life is enhanced by library and that the material they want is there.

Transfer Performance - Library Summary (Fiction)

Items selected for transfer between 03-Jan-2014
And 07-Nov-2016

Library	Number Of Copies			Average Dead Months Before Transfer	Additional Circulation Since Transfer	Average Months Since Transfer	Additional Circulation Per Month	Additional Circulation Per Copy Per Month
All	16044 Items	Source	Collections	6.67	79773	19.25	4142.73	0.25

Transfer Performance - Library Summary (Non-Fiction)

Items selected for transfer between 03-Jan-2014
And 07-Nov-2016

Library	Number Of Copies			Average Dead Months Before Transfer	Additional Circulation Since Transfer	Average Months Since Transfer	Additional Circulation Per Month	Additional Circulation Per Copy Per Month
All	4521 Items	Source	Subjects	10.65	19249	25.81	745.77	0.16

Transfer Performance - Library Summary (Non-Book)

Items selected for transfer between 03-Jan-2014
And 07-Nov-2016

Library	Number Of Copies			Average Dead Months Before Transfer	Additional Circulation Since Transfer	Average Months Since Transfer	Additional Circulation Per Month	Additional Circulation Per Copy Per Month
All	143 Items	Source	Collections	10.29	717	21.92	32.69	0.22

Allocate More Funds to High Demand Items and Make More Informed Purchasing Decisions

collectionHQ's Popular Author and Popular Subject Summary tools have helped to make sure that the library is suitably stocked in high demand items to meet patron expectations. In addition, Michael explained: "We also run reports to show where any additional portions of funds would best be spent, to see how our standing orders are working out, as well as what collections need more funds and which need less." To support the spending of extra funds, the team uses the Select tools including Selection Specification - System Wide, Popular Author Standing Order, Spending Plans, and one of Michael's favourites, the Understocked and High Use Subject Detail.

STAFF FEEDBACK

Gaining staff buy in to collectionHQ is one of the keys to getting the most from the tool. At Mid-Columbia Libraries, training and sharing of positive results has encouraged branch staff to see the value in the tool so that they use it regularly. Michael continues: "Each branch has someone dedicated to collectionHQ which gives control back to the branches to see what's important and to pull things in based on transfer number."

The reaction of branch staff towards the introduction of collectionHQ Transfers was positive since the collection was already floating and Transfers had been in use for a period before they were rolled out across the wider team. Questions raised by staff typically centered around availability of items, for example, why were certain items being made available for Transfer and why at certain times were few items available for transfer. More generally, staff were interested to learn how Transfers worked which Michael was able to address through training.

TOP TIP

For customers who are new to collectionHQ or the Transfer tools, Michael shared a useful tip: "Slow and steady wins the race. I would recommend getting as knowledgeable about transfer prior to implementing, setting up a solid schedule, and keeping to it. Provide staff with good training." As illustrated, the Schedule Management Tool has been instrumental in integrating Transfers into regular workflow and Michael would encourage other libraries to apply this tool.





KEY BENEFITS

**Get more value
from existing
collection**

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**Increase
circulation**

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Reduce waste

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**More relevant
collections and
satisfied patrons**

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Boost staff morale