**COLLECTION ANALYSIS**

This collection analysis has six components:

* Part 1: Collection Overview
* Part 2: Analysis to Determine Quality
* Part 3: Analysis to Improve the Age of the Collection
* Part 4: Analysis to Estimate Costs for Improvement
* Part 5: Analysis by Diversity
* Part 6: Reflection on the Entire Process

**PART 1: COLLECTION OVERVIEW**

**PURPOSE**

**THE PURPOSE** is to analyze the collection by looking at the items, their amounts, age, and circulation.

**BACKGROUND**

Expect to have multiple concerns. Your collection is older than you would like. Secondly, your circulation might need a boost, especially if you are at the secondary level. Third, you’ll be distressed by how many books that have never circulated. You’ll want to consider how databases may impact print holdings, especially in the 500 and 900s. But the key thing I hope you discover is that this work is fun!

**YOUR TASK**

1. For the first three columns, use the automated circulation report for **the last academic year**.
2. To calculate % of section, divide the section’s book count by the total number of books in the collection.
3. In the last column, answer yes or no by considering: (1) the Kerby Chart of Considerations and (2) your knowledge of curriculum and student interests.

**Identify school:**

**Number of students:**

**How many books per student:** (10 books is plenty. More than 20 is most likely too many.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Dewey** | **# Items** | **Average Copyright Age/State Age in Years** | **Circulation** | **# & % of books with no circulation** | **% Total Collection** | **Section needs work?** |
| Reference |  |  |  |  |  |  |
| 000 |  |  |  |  |  |  |
| 100 |  |  |  |  |  |  |
| 200 |  |  |  |  |  |  |
| 300 |  |  |  |  |  |  |
| 400 |  |  |  |  |  |  |
| 500 |  |  |  |  |  |  |
| 600 |  |  |  |  |  |  |
| 700 |  |  |  |  |  |  |
| 800 |  |  |  |  |  |  |
| 900 |  |  |  |  |  |  |
| 92/920 |  |  |  |  |  |  |
| Easy\* |  |  |  |  |  |  |
| Fiction |  |  |  |  |  |  |
| Graphic Novels\*\* |  |  |  |  |  |  |
| **TOTAL** |  |  |  |  |  |  |
| eBooks |  |  |  |  |  |  |
| Databases |  |  |  |  |  |  |

\*The Easy (Everybody) Section is for elementary collections.

\*\*Use this row IF your graphic novels have been moved to their own section. Originally, they were shelved in the 700s.

**Kerby’s Chart of Considerations\***

|  |  |  |
| --- | --- | --- |
| Grades PK-12 | | |
| **Category** | **% of Items** | **Years / Age** |
| 000 | .5–1 % | 5–7 years |
| 100 | .5–1 | 10–11 |
| 200 | .5–1 | 9–11 |
| 300 | 6–10 | 7–11 |
| 400 | .5 | 9–12 |
| 500 | 5–12.5 | 7–8 |
| 600 | 5–7 | 7–9 |
| 700 | 5.5–8 | 8–9 |
| 800 | 2–8 | 7–13 |
| 900 | 6.5–12 | 8–9 |
| 92/920/B | 5.5–9 | 9–12 |
| Easy\*\* | 28 | 11 |
| Fiction\*\* | 22-40 | 12 |
| eBooks | ? | ? |
| Databases | ? | ? |

\* This chart is based on the recommendations provided by Follett and Mackin.

\*\*Easys (or Everybody books) are for elementary schools only.

\*\*\*For fiction in K-5 schools, the suggested percentage is 22%, for middle schools 38-40%, for high school 26-30%.

**PART 2: ANALYSIS TO DETERMINE QUALITY**

**PURPOSE**

**The** **PURPOSE** is to select a section of the library and complete a sample to estimate the quality of titles.

**BACKGROUND**

To be blunt, the quality of library collections is poor. I’ve never found a collection that matched Wilson’s “Essential” titles better than 20%. This means that about 80% of the library’s titles are not essential. This must change. You’ll work to change that.

**YOUR TASK**

1. Choose a large section (about 1,000 books), like part of the fiction or a major nonfiction area(s).
2. Print a list of titles with copyright year and circulation.
3. Use a 10% **randomized** sample for analysis.
   1. Use a dollar bill’s first number as your starting point.
   2. Select every 10th title (or appropriate interval).
   3. Highlight sample titles.
   4. Look up the highlighted 100 titles in the appropriate Wilson’s database. Mark if the title is listed as “Essential.” **Note**:If you are evaluating a high school library, know that many adult titles will not be found in *Wilson’s Senior High Core Collection* database. A good alternative is to choose Hoover Library’s database “Academic Search Complete,” and type in the title, and the reviews will then show up. If another option is still needed, you can use *Booklist*. But ask me first!
   5. Record how many are labeled **“Essential”** in Wilson’s (or “Recommended” in Booklist.)
   6. This sample gives you a good idea of the quality of your collection.
4. **Summarize your findings in a chart.** See chart template below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Dewey Number/Subject** | # of Items on Shelves | Copyright | % of Wilson’s **Essential** titles on shelves |
| *You may use as many rows as you need.* |  |  |  |
|  |  |  |  |
|  |  |  |  |

**PART 3: ANALYSIS TO IMPROVE THE AGE OF THE COLLECTION**

**PURPOSE**

**The** **PURPOSE** is to estimate how many titles to weed from your collection to improve its age.

**BACKGROUND**

The Excel formula may suggest a large number of books to weed—this doesn’t mean you should remove them all. Use your judgment to create a reasonable weeding plan.

**YOUR TASK**

1. **Identify books to weed by:**
   1. Physically checking shelves
   2. Reviewing low-circulation titles.
   3. Applying the MUSTIE formula and the CREW Method.
2. Use the Excel file: **Formulas for Weeding and Purchasing**.
   1. Use the first tab “Weeding Estimator.”
   2. Fill in Columns B-E.
   3. Run formula to determine Columns F-G.
3. **Record results in the chart.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dewey** | **# Items** | **Average Copyright Age** | **Target Age** | **Weeding %** | **# Titles to Weed** |
| Reference |  |  |  |  |  |
| 000 |  |  |  |  |  |
| 100 |  |  |  |  |  |
| 200 |  |  |  |  |  |
| 300 |  |  |  |  |  |
| 400 |  |  |  |  |  |
| 500 |  |  |  |  |  |
| 600 |  |  |  |  |  |
| 700 |  |  |  |  |  |
| 800 |  |  |  |  |  |
| 900 |  |  |  |  |  |
| 92/920 |  |  |  |  |  |
| Easy\* |  |  |  |  |  |
| Fiction |  |  |  |  |  |
| Graphic Novels\*\* |  |  |  |  |  |
| **TOTAL** |  |  |  |  |  |

**PART 4: ANALYSIS TO ESTIMATE COSTS FOR IMPROVEMENT**

**PURPOSE**

**The PURPOSE** is to calculate how many books you need and estimate the cost to improve the collection.

**BACKGROUND**

This number may be high—don’t worry. Choose a reasonable annual funding request that shows good planning. Most likely, you’ll spread purchases over several years.

**YOUR TASK**

1. Use the Excel file: **Formulas for Weeding and Purchasing**.
   1. Select Excel tab “Purchasing Priorities Planner.”
   2. Fill in Columns B-E.
   3. Use formulas for Columns F-G.
2. **Record results in the chart.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dewey** | **Books Weeded** | **Priority: High, Middle, Low** | **Estimated Available Titles** | **Books to Purchase** | **Estimated Cost** |
| 000 |  |  |  |  |  |
| 100 |  |  |  |  |  |
| 200 |  |  |  |  |  |
| 300 |  |  |  |  |  |
| 400 |  |  |  |  |  |
| 500 |  |  |  |  |  |
| 600 |  |  |  |  |  |
| 700 |  |  |  |  |  |
| 800 |  |  |  |  |  |
| 900 |  |  |  |  |  |
| 92/920 |  |  |  |  |  |
| Easy\* |  |  |  |  |  |
| Fiction |  |  |  |  |  |
| Graphic Novels\*\* |  |  |  |  |  |
| **TOTAL** |  |  |  |  |  |

**PART 5: ANALYSIS BY DIVERSITY**

**PURPOSE**

**The PURPOSE** is to (a) evaluate your collection for diversity in **8** categories and (b) select **3** recently published and highly reviewed titles on one diverse category.

**BACKGROUND**

Follett, Mackin, and TeachingBooks.net offer diversity tools. Each has pros and cons. Titlewave and Mackin are free. (Your library supervisor must turn on the Follett diversity analysis. Most MD supervisors have turned on this feature. If your district has a district subscription to TeachingBooks.net, then you can also access their reports free.

But as wonderful as this diversity analysis sounds, there are several “issues” with the reports. One, the reports are overwhelming. Follett uses some 300 tags!

Two, the analysis isn’t always accurate, and here is why. Titlewave uses BISAC codes to analyze the collection. BISAC codes are assigned by the publisher—voluntarily with no monitoring on the correctness of the assigned terms—which means there are tons of mistakes. I love the BISAC term “Diverse Families,” but the BISAC term is a catch all phrase. A diversity report that I looked at for an elementary school collection had 250 hits for “Diverse Families.” Think about what that term means—do you really believe an elementary library would have 250 titles with a subject matter of diverse families?

And the third dilemma—your goal is to purchase recently published and highly reviewed diverse titles. Easier said than done! Try looking up Muslim American in either Wilson’s databases for “essential” titles published in the last two years. Or, use your book jobber and set it to select books about Muslims with three reviews, published within the last two years, and you will see what I mean.

This means you need to adjust the advance settings in the Wilson’s databases. Use multiple terms with the conjunction “or.” You might need to search for “recommended” titles to improve hits. To say it simply, fiddle with the advance settings. And share your thought process in the reflection.

Look over the terms, pick your favorites, and choose a company to analyze the collection.

* **Follett Titlewave** uses BISAC codes—These seem the most relevant to me:

1. African American
2. Asian American
3. Hispanic
4. Learning Disabilities
5. LGBTQIA+
6. Muslim American
7. Physical Disabilities

* **Mackin** uses its own diversity tags for their reports. Here are a few of them:
  1. African American Voices
  2. Diverse Cultures
  3. LGBTQIA+
  4. Asian American
  5. Hispanic/Latinx
  6. Indigenous/Native American
  7. Neurodiversity
  8. Disability Representation
  9. Gender Identity
  10. Immigrant Experiences
  11. Religious Diversity
  12. Global Perspectives
  13. And often themes like Women's History and Mental Health
* **TeachingBooks.net** uses **cultural definitions** that they created. See this [link](https://school.teachingbooks.net/support.cgi?f=definitions).
  1. African
  2. African American
  3. American Indian
  4. Asian
  5. Asian American
  6. Disability
  7. Gender
     + Women / Girls
     + Transgender / Non-Conforming
     + Men / Boys
  8. Immigrant / Refugee
  9. Latino
  10. LGBTQ+
  11. Middle Eastern
  12. Multiracial
  13. Muslim
  14. Pacific Islander

**YOUR TASK**

1. Choose a diversity analysis using Follett, Mackin, or TeachingBooks.net.
   1. Start with: African American, Asian American, Hispanic, LGBTQIA+.
   2. Choose 4 more relevant to your community.
2. Select **3** recent, highly reviewed titles on **one** topic.
   1. Titles must be published in the last two years.
   2. Books must have three positive reviews in Titlewave or Mackin—**or**—be listed as Essential in Wilson’s database.
   3. Include the reviews.
   4. If it’s impossible to find three highly reviewed titles on one topic, then you’ll explain your reasoning in the reflection.
3. **Record results in the chart**.
   1. In the 2nd column, list the number of books in the collection.
   2. For the 3rd column, give the average age of those books.
   3. For the last column: # of Essential & Current Titles Available for Purchase, do this:
      1. Look up each topic in Wilson’s databases and use Advance settings.
      2. Adjust settings for “Essential” titles.
      3. Adjust settings to find books published within the last **2** years.
      4. In the last column, insert the number of “Essential” titles that you found in Wilson’s. **NOTE:** Again, use advanced settings to with multiple search terms, using the “or” conjunction.

**Chart Template Example**

|  |  |  |  |
| --- | --- | --- | --- |
| Company: (Insert name of company you used) | | |  |
| Diversity | # of Books in the collection | Average Age of books in collection | # of Essential & Current Titles Available for Purchase |
| 1. African American |  |  |  |
| 1. Asian American |  |  |  |
| 1. Hispanic |  |  |  |
| 1. LGBTQIA+ |  |  |  |
| 1. Your choice |  |  |  |
| 1. Your choice |  |  |  |
| 1. Your choice |  |  |  |
| 1. Your choice |  |  |  |

**PART 6: REFLECTION ON THE ENTIRE PROCESS**

Write a reflective paragraph for **Parts 1-5**. Include: (1) what you learned, (2) ahas, surprises, or insights, and (3) your goals—what more you want to do/learn/plan.

Additional suggestions to include in the reflections:

1. **Part 1: Collection Overview**
   1. Analyze your findings.
   2. How does your collection compare to Kerby’s Chart of Considerations?
   3. Do databases or eBooks affect your print needs?
   4. What’s your ideal books-per-student ratio?
   5. What 3 sections need the most attention?
   6. Identify strategies to improve circulation.
2. **Part 3: Analysis to Improve Age of Collection**
   1. Are the suggested weeding numbers realistic? Why?
3. **Part 4: Analysis to Estimate Costs for Improvement**
   1. Is the cost of updating your collection manageable?
   2. How could you present a reasonable budget to a principal?
4. **Part 5: Analysis by Diversity**
   1. Which tool did you use and why?
   2. Which diverse topics did you focus on and why?
   3. What challenges did you face finding current, essential titles?