Assess to Impress!

Using Polaris data to curate a user-driven collection

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What we'll cover

- Background
- Data point selection
- Refinement process
- Current assessment
- Automated reports
- Internal results
- External results

Background

Who are we?

- Boise Public Library, a central library with four branches
- We have approximately **365,000 physical items across all locations**
  - Approximately **315,000** are available for checkout (The rest are in-house use only)
- Our branch collections range in size from **17,500 items to 40,000**, with nearly **200,000 circulating items** at the central downtown location
  - We do not evaluate Econtent (Overdrive, RBDigital), non-circulating, or gov doc repository collections in this assessment
- Part of Lynx! Consortium
  - A group of 12 individual libraries located mostly in the Southwestern Idaho area
  - We share Polaris, but we don't manage, maintain, or assess other libraries' items in any way

What does our collection development team look like?

- We're centralized
- We share budgets

Why create our own assessment tool?

Cost & consortium data issues were roadblocks to using 3rd party software

Detailed analytics that are adaptable

- Ability to reconfigure historical data based on newly identified data points
- Customize reports/infographics to the needs of the stakeholder audience

Personal knowledge of the collections at each location

- Notes fields to track what selectors are doing within collections
- Historical data helps to show trends – a deep dive into the reports allows further follow-up

Choose own data points and get to a more granular level

- Ability to identify and tweak data points as needs come to light

Readily available tools (that didn't require system admin permissions)

Excel

- Relatively familiar to everyone
- Doesn't require specialized training or knowledge to use, unlike other infographic or data spreadsheet programs
- Organizational license makes the program available for all

Simply Reports

- Easier to create reports, set display order of data, and run test reports before publishing them
- Don't have to know SQL coding to choose specific data points
- Already familiar with SR to run item lists for weeding and ordering
- Ability to publish reports to Polaris reporting services for further manipulation

Polaris Reporting Services

- Automate running/sending reports
- Manipulate SQL coding

Data Point Selection

What data is readily available?

- Previous year circs
- Last checkout date vs last activity date
- Calculating turnover rate
- Account for items that are in the collection but are actually not available
  - How those numbers impact circulation

What do you want to accomplish?

- Deep weed
- Data to justify pulling worn material that is still circulating well
- Granular metrics to see what collections are doing well or poorly
- Comparison metrics

Things to consider for the project

Establish a philosophy of choosing data points

- What are you trying to accomplish?
  - Weeding stagnant or outdated collections
  - Assess and fill in subject area gaps
  - Discovering specific areas of the collection that are doing better or worse than expected

What we wanted

- Comparison between locations
  - Limited to our branches, not consortium-wide
- Data for Dewey checkout ranges
  - What part of adult non-fiction was doing well, what wasn't, according to hard numbers
- Turnaround time and percentage out
  - While taking into account items that were actually unavailable due to lost/missing/claimed status

First efforts…a learning experience

Used static collection counts pulled in January for percentages, but ran each collection manually which took three months to complete

- This meant the collection count from January did not match the collection totals by the time some collections were run

Thought a printable format was wanted, so extra work went into creating snapshot summaries

- Data was pulled by hand into Word documents to summarize findings
- Excel data sheets were screen shots pasted into the individual summary Word documents

Each collection was hand-entered, and Excel formulas were only active for single sheets

- More chances to mis-enter data

Three months to complete assessment

- For an annual project, this was NOT sustainable

First assessment, 2017

Boise Main Library
Youth Non-Fiction

Total items:	**17,206**
29% of youth print **83%** of youth non-fiction	
Checked out:	**23%**
2017 Turnover:	**4.43**
Average age:	**7 years**
Items that checked out in 2017:	**87%**
Acceptable Last Checkout Range:	**1.5 years**
Items out of range:	**2%**

Main	NumberOfItems	2017 ckos	Lifetime ckos		
Youth Non-Fiction	16,895	74,884	420,210		
Date of Report:	Total Active:				
2/23/2018	16,756				
Turnover:	2017	Lifetime			
	4.43	24.87			
Percent of collection (less inactive):				Inactive items:	
Total Location Materials:	284,750	6%		Claims Returned:	24
Total Youth Materials:	66,036	25%		Lost:	73
Total Youth Print:	59,807	28%		Missing:	17
Total Youth Non-Fiction:	20,771	81%		Unavailable:	25
				Withdrawn:	-
Percent checked out (less excluded):				Total:	139
Total checked out at report:	3,923	24%		% of collection:	1%
Total checked in at report:	12,853	79%			
				Excluded items:	
Items that checked out in 2017:	15,139	90%		Bindery	7
				On Order	351
Circulation Statistics:				In-process	59
Acceptable Last Checkout Range:	1.5 years			In-Repair	9
				Total:	426
Items out of ALCR:	409	2%		% of collection:	3%
Items 0 ckos:	312	2%		Highest Circulating title 2017:	
Items 1-19 ckos:	7,279	43%		Garfield Pigs Out	
				741.5697	
Items 20-39 ckos:	6,252	37%		30 ckos	
				6.5 yrs old	
Items 40+ ckos:	3,091	18%			
				Highest Circulating title overall:	
Average age of collection:					
By acquisition date:	12/7/2010	7 years		Syd Hoff's Animal Jokes	
By copyright:	2009	9 years		818.5402	
				199 ckos	
Items copyright 2017:	1,119	7%		22 yrs old	
Average last checkout:	10/7/2017	4 months			
Average checkouts:	25				

Refinement Process

Cumbersome first draft led to a better understanding of each individual collection and their performance at different locations, but also led to data point refinement

Realized that stakeholders would not be reading the assessment as a whole

- Didn't need to continue with a separate summary perspective

Had been writing a narrative summary for each collection and location, and we decided that was also unnecessary

- It was better to give presentations with the data already in an easily digestible format rather than word-heavy narrative

Automated reports were a MUST

Data Point Revision

Not all data points were helpful for every collection, but consistency was important between sheets, so team discussed and compromised

- Different criteria for non-fiction weeding make the % out in a year valuable – not so much for AV
- Collection code data point was important to include for youth nonfiction and was retained, even though it wasn't necessary for other collections

What changed

- Turnaround time and percentage out are helpful, but not enough
- Heavy weeding can skew turnover numbers artificially – needed to add hard numbers to further inform health of the collections
- Tracking the size of individual collections in relation to the 'parent' collections didn't tell us anything pertinent
- Added number and percentage of items in collection that had a copyright date range of two years or less in addition to age by acquisition and copyright dates

Current statistics sheet, 2019

- Statistics overview gives most relevant data points for current year
- Consolidated statistics overview, items table, and comparison sheets into single file
- Everything else builds off statistics sheet

B10 =COUNTIF(Table1[2019],">=1")

	A	B	C	D	E	F	G
1	**Main**	NumberOfItems	2019 ckos	Lifetime ckos			
2	**Fiction**	20,403	84,495	655,938			
3	Date of Report:	Adjusted*:				**Inactive items:**	
4	1/2/2020	**20,254**				Claims Returned:	40
5						Lost:	87
6	**Turnover:**	**2019**	**Lifetime**			Missing:	40
7		**4.17**	32.15			Unavailable:	1
8						Withdrawn:	1
9	**Percent out in assessment year:**					Bindery	146
10	Items that checked out in 2019:	15,963	**79%**			On Order	117
11						In-process	32
12	Items out at reporting:	4,508	22%			In-Repair	2
13	**Notes:**					**Total:**	466
14						% of collection:	2%
15							
16	**Circulation Statistics:**		Months prior:				
17	Average last checkout:	5/18/2019	7				
18							
19	Items 0 ckos:	381		**2%**			
20							
21	Items 1-19 ckos:	8,469		**42%**			
22							
23	Items 20-39 ckos:	6,088		**30%**			
24							
25	Items 40+ ckos:	5,465		**27%**			
26							
27	Average checkouts:	**32**					
28							
29	**Average age of collection:**			Years old:			
30	By acquisition date:	**9/7/2012**		7			
31	By copyright:	**2008**		11			
32	Items copyright 2017-2019:	5,067		**25%**			

Statistics | Items | Comparisons

Formulas added to Excel sheets

Multiple types of formulas were added to statistics sheets so more data was auto-calculated at time of entry

- Percentages calculated (example: % items that checked out in assessment year)
  - =SUM(B12/B4)
    - Cell pre-formatted for percentage, so output was displayed properly
- Date formulas (example: Average age of collection by acquisition date)
  - =ROUND(YEARFRAC(B30,A4),0)
- Calculation formulas
  - =COUNTIF(Table1[2019],">=1")
- Destination formulas (example: average age by acquisition date in comparison sheet)
  - =Statistics!$D$30

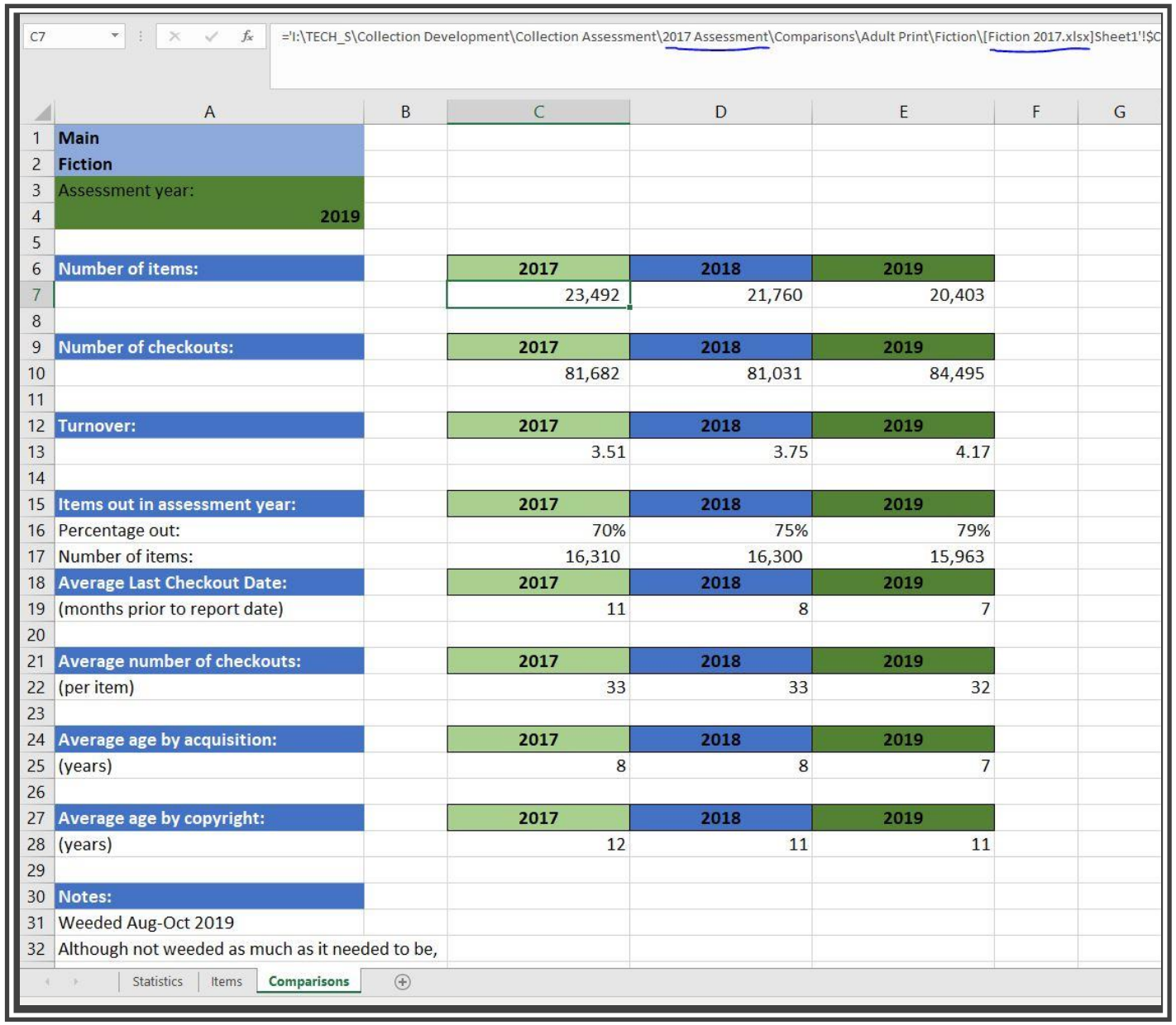
Everything builds off statistics sheet, requiring file structure to be the same

- This allows comparison sheets to function properly

Current Assessment

Demonstration of Statistics and items sheet

- Note tables and sorting features
- Statistics sheet and items list form basis of comparison sheets
- Cells point to each other as well as point to other files and sheets
- File structure consistency is vital



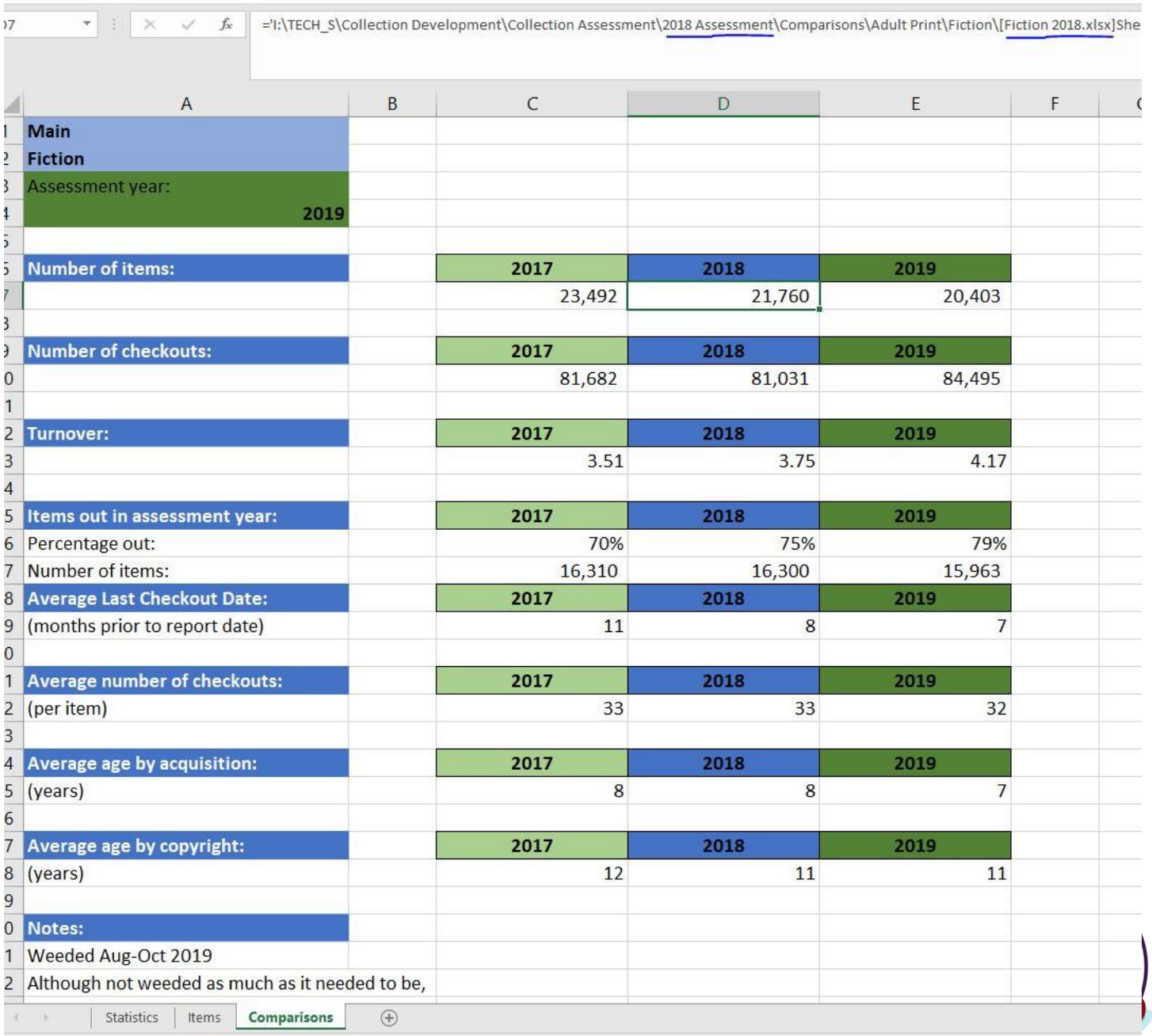
	A	B	C	D	E	F	G
1	**Main**						
2	**Fiction**						
3	Assessment year:						
4	**2019**						
5							
6	**Number of items:**		**2017**	**2018**	**2019**		
7			23,492	21,760	20,403		
8							
9	**Number of checkouts:**		**2017**	**2018**	**2019**		
10			81,682	81,031	84,495		
11							
12	**Turnover:**		**2017**	**2018**	**2019**		
13			3.51	3.75	4.17		
14							
15	**Items out in assessment year:**		**2017**	**2018**	**2019**		
16	Percentage out:		70%	75%	79%		
17	Number of items:		16,310	16,300	15,963		
18	**Average Last Checkout Date:**		**2017**	**2018**	**2019**		
19	(months prior to report date)		11	8	7		
20							
21	**Average number of checkouts:**		**2017**	**2018**	**2019**		
22	(per item)		33	33	32		
23							
24	**Average age by acquisition:**		**2017**	**2018**	**2019**		
25	(years)		8	8	7		
26							
27	**Average age by copyright:**		**2017**	**2018**	**2019**		
28	(years)		12	11	11		
29							
30	**Notes:**						
31	Weeded Aug-Oct 2019						
32	Although not weeded as much as it needed to be,						

Comparison sheet, file path example

- ‘2017 Assessment’ and ‘[Fiction 2017]’ are noted
- **File name accuracy** allows for copying into the adjacent cell or column and making a find/replace change to minor parts of the file path
- **File name consistency** allows for global path name changes

Comparison sheet file path name, 2018 illustration

- Again, ‘2018 Assessment’ and ‘[Fiction 2018]’ highlighted
- Illustrate single date change in formula to update file path



Comparison sheet file path name, 2019 illustration

- Cell points to sheet within same file for current year
- Can still be updated for next year's assessment with simple date change

E7 =Statistics!$B$2

	A	B	C	D	E
1	**Main**				
2	**Fiction**				
3	Assessment year:				
4	**2019**				
5					
6	**Number of items:**		**2017**	**2018**	**2019**
7			23,492	21,760	20,403
8					
9	**Number of checkouts:**		**2017**	**2018**	**2019**
10			81,682	81,031	84,495
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13			3.51	3.75	4.17
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15	**Items out in assessment year:**		**2017**	**2018**	**2019**
16	Percentage out:		70%	75%	79%
17	Number of items:		16,310	16,300	15,963
18	**Average Last Checkout Date:**		**2017**	**2018**	**2019**
19	(months prior to report date)		11	8	7
20					
21	**Average number of checkouts:**		**2017**	**2018**	**2019**
22	(per item)		33	33	32
23					
24	**Average age by acquisition:**		**2017**	**2018**	**2019**
25	(years)		8	8	7
26					
27	**Average age by copyright:**		**2017**	**2018**	**2019**
28	(years)		12	11	11
29					
30	**Notes:**				
31	Weeded Aug-Oct 2019				
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Statistics | Items | Comparisons

Automated Reports

Manually running reports was not sustainable for an annual report

Needed a way to run all collections on the same timeframe so numbers would be accurate and use same baseline

File structure and naming conventions are crucial to an automated system

Consistency is necessary, but also easier

- Used Polaris collection ID numbers and initials of branch locations as file names for each location
- Created a report key to track file names and collections
  - Necessary when collections were merged into single reports

Report Key example

Report Name	Report Content	Coll Code	Notes
BM2	Adult (M) Rated Video Game (AV)	arvg	
BM4	Adult Audio Fiction (AV)	aaf	
BM5	Adult Audio Non-Fiction (AV)	aanf	included in audio fiction (BM4)
BM7	Adult Book Club Kit (Print)	abck	main only
BM8_Fic	Adult Books New (Print)	abn	No longer used as of 6/2019
BM8_NF	Adult Books New (Print)	abn	Non-fiction new books
BM13	Adult Fiction - Fantasy (Print)	affa	includes BM86
BM17	Adult Fiction - Mystery (Print)	afm	includes BM88
BM18	Adult Fiction - Romance (Print)	afr	includes BM89
BM19	Adult Fiction - Science Fiction (Print)	afsf	includes BM90
BM21	Adult Fiction - Western (Print)	afw	includes BM91
BM10	Adult Fiction (Print)	af	includes BM87
BM33	Adult Graphic Novel (Print)	agn	
BM34	Adult Holiday (Print)	ah	main only
BM41	Adult Large Print - Fiction (Print)	alpf	
BM45	Adult Large Print - Non-Fiction (Print)	alpnf	included in large print fiction (BM41)

Using Simply Reports to publish

Once data points are chosen, use SR to create a generic report

- Arrange and sort the data in the way you want it to appear in Excel using ‘columns selected for output’ and ‘columns selected for sort’
  - The more organization built into the raw data itself, the less manipulation required for assessment reports
- Submit report

On the report preview screen, click ‘Save report parameters for later use’ and name the report

- Use the report description field as well if your organization or SR login already has lots of saved reports
  - Example: single location single collection; report description: collection assessment
  - Example: single location Dewey breakouts; report description: collection assessment

Saved report will appear in list of that type of report for that login

- Select the report and click ‘Advanced publish’
- Choose folder location for the report to be published to
  - Report will appear in that folder in Polaris Reporting Services

Simply Reports publishing

Saved reports

Select one or more report types

- Fund summary reports
- Hold count reports
- Hold list reports
- Hold statistical reports
- Invoice list reports
- Invoice summary reports
- Item count reports
- Item list reports
- Item MARC Export
- Item statistical reports
- Patron account count reports
- Patron account list reports

Select	Report name	Report description	Creation date	Last run date	Creator	Repo
☐	acq		05/10/2019	05/10/2019	bcolldevreports	Item
☑	Assessment Report		10/09/2018	10/10/2018	bcolldevreports	Item
☐	Branch fiction weeds		08/25/2016	08/30/2017	bcolldevreports	Item

Schedule reports | Run reports | Publish report | Advanced publish

Advanced Publishing

Report name: Assessment Report

Report description:

Report orientation: ◉ Landscape ○ Portrait

Branch to publish to: Boise Main Library

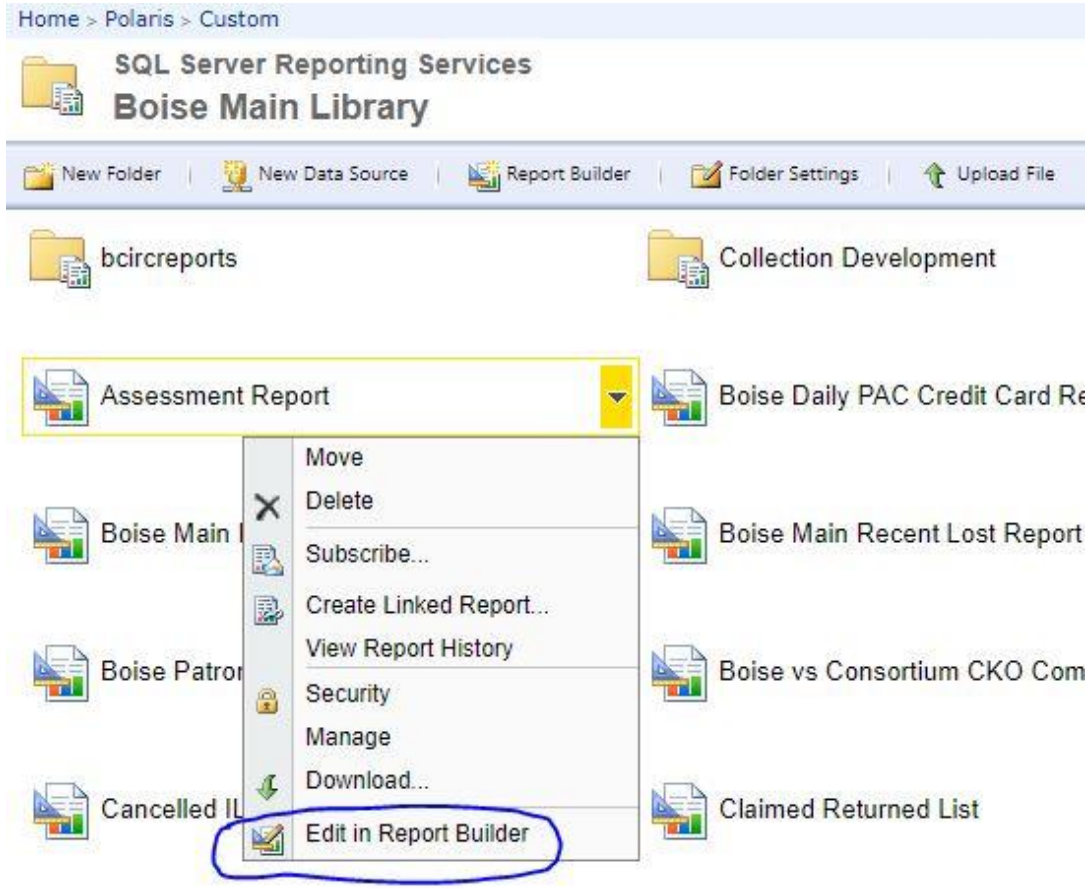
Publish to: ○ Personal folder ◉ Branch folder

Publish

Polaris reporting services

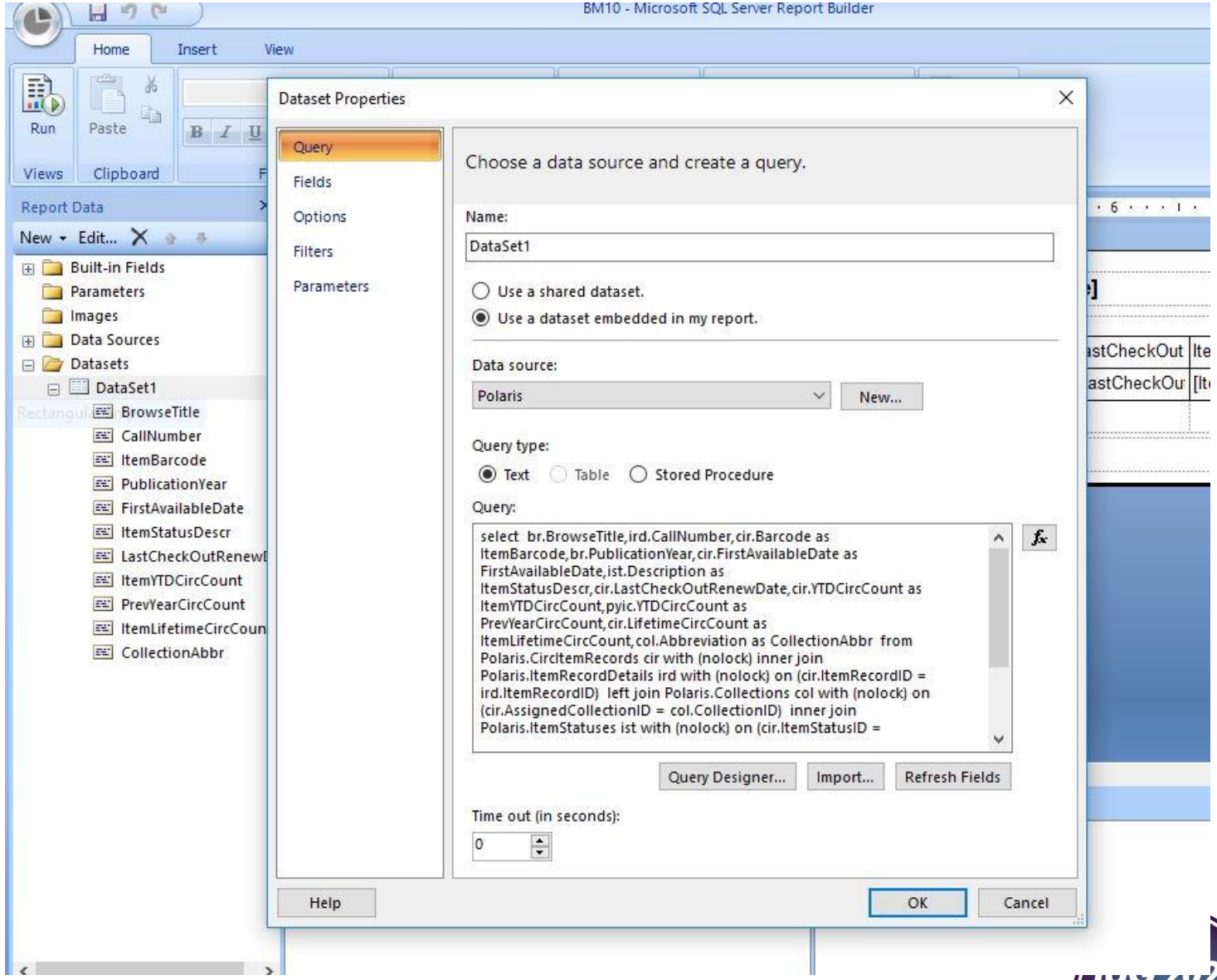
- Once the first report is in reporting services, you can use MS Report Builder to create the same type of report by manipulating the SQL query

- This allows you to duplicate and create as many reports as you need without having to manually create or edit them in SR



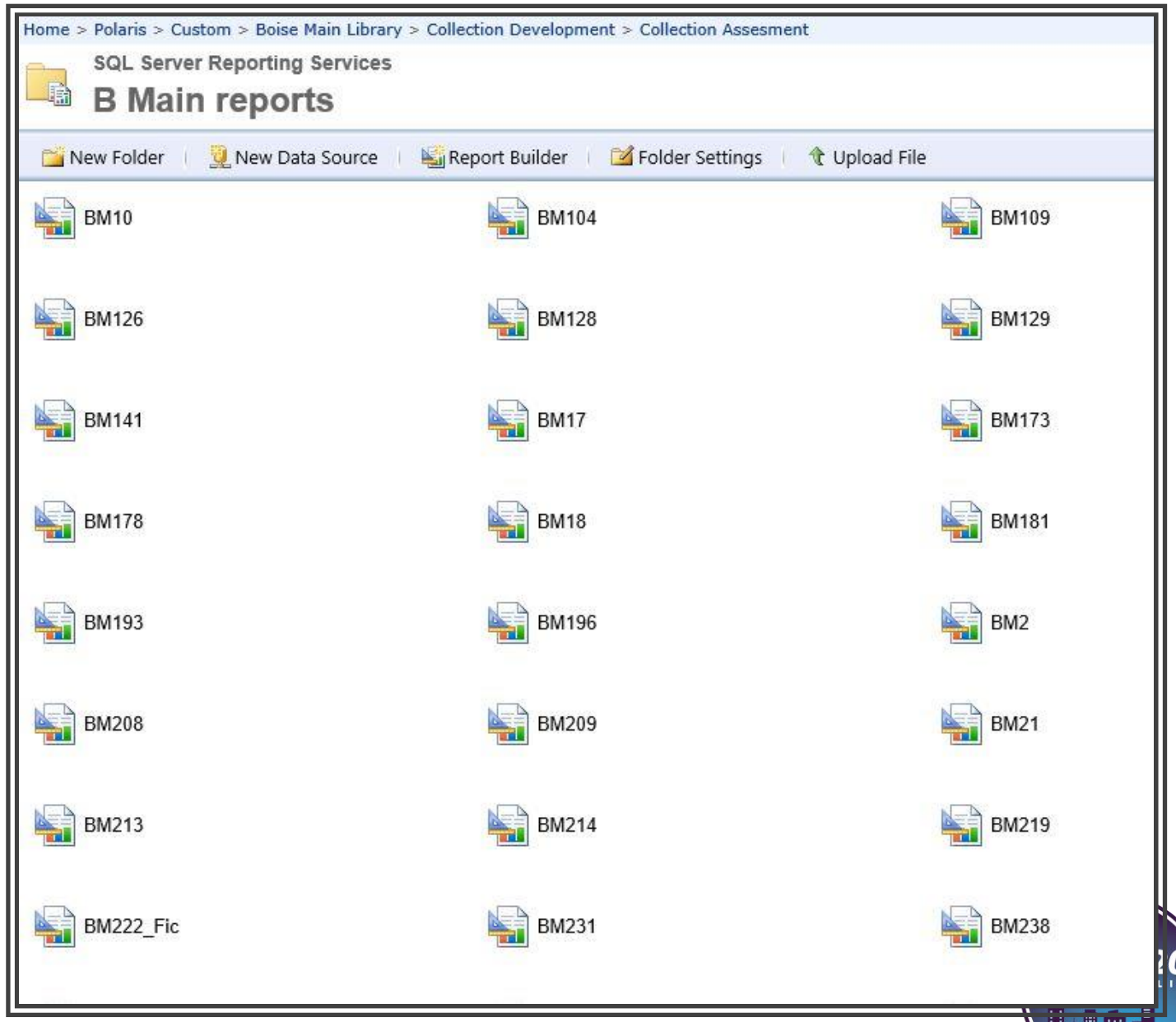
Using MS Report Builder to edit SQL query

- Only requires knowledge of which codes and information need to be replaced to create specific collection and location reports
- Use ‘Save As’ to rename each report according to Report Key conventions after SQL query is changed to reflect individual collections
  - ‘Save As’ is your best friend



Reports created in Polaris Reporting Services

- Once SQL queries are manipulated and reports are created and named they are stored in Polaris reporting services
  - Note: Polaris lists reports by first digit rather than numerically
- Next step: set up all reports to run automatically using subscription service



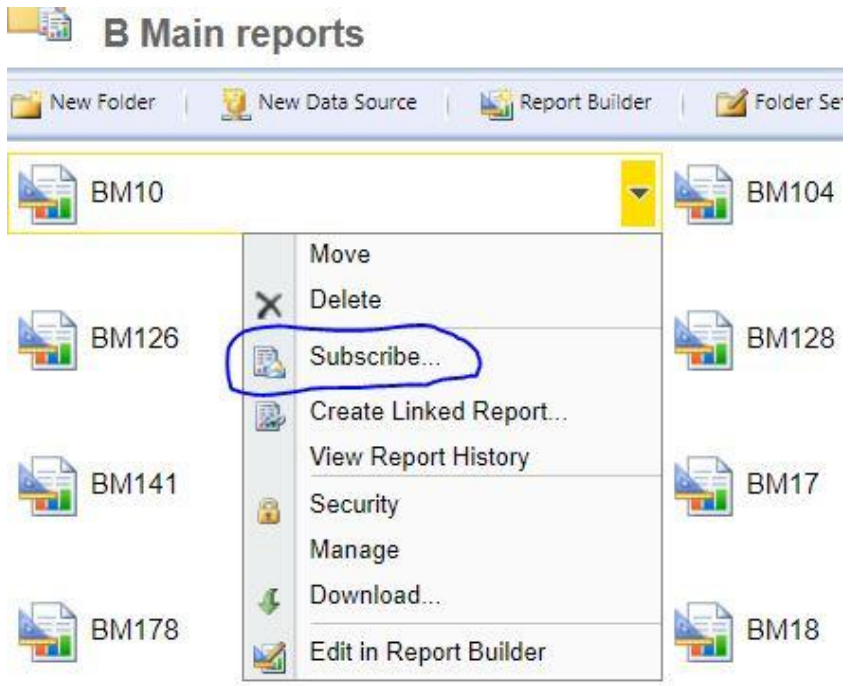
Subscription setup to create automated report

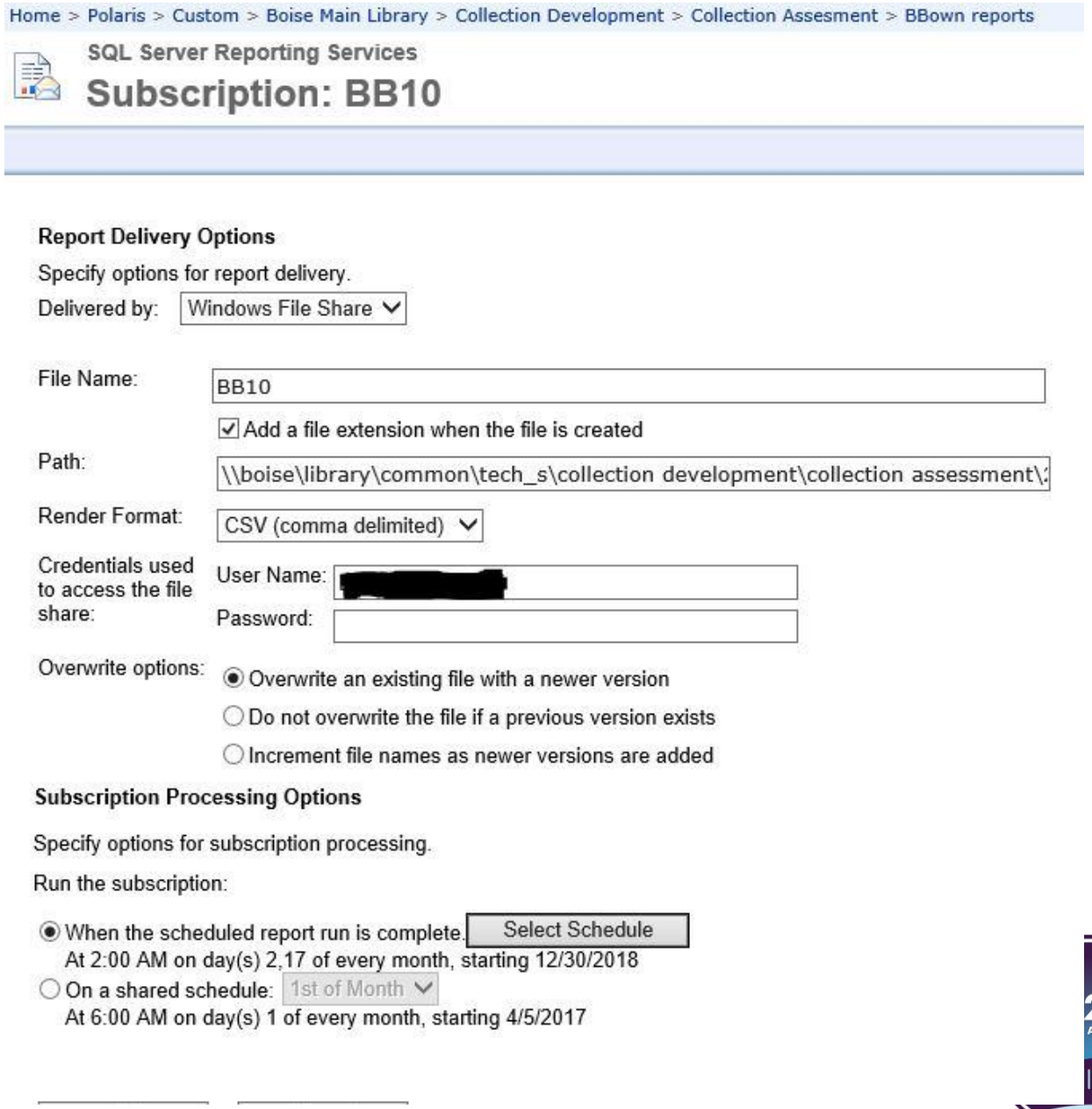
- Once reports are created with MS Report Builder, named, and saved in folders, use drop-down menu ‘Subscribe’ to set up scheduled reports and send them to designated file path (see slide 26)

- Important to set up with these settings so reports will be delivered to the correct folders
  - Delivered by ‘Windows File Share’
  - Make sure render format is set to ‘CSV’
  - Make sure run schedule is the same for each report
    - Must enter password each time for setup and any edit in schedule

- Once reports are automated, they will land in designated folders ready for input into statistics sheet in assessment (slide 27)

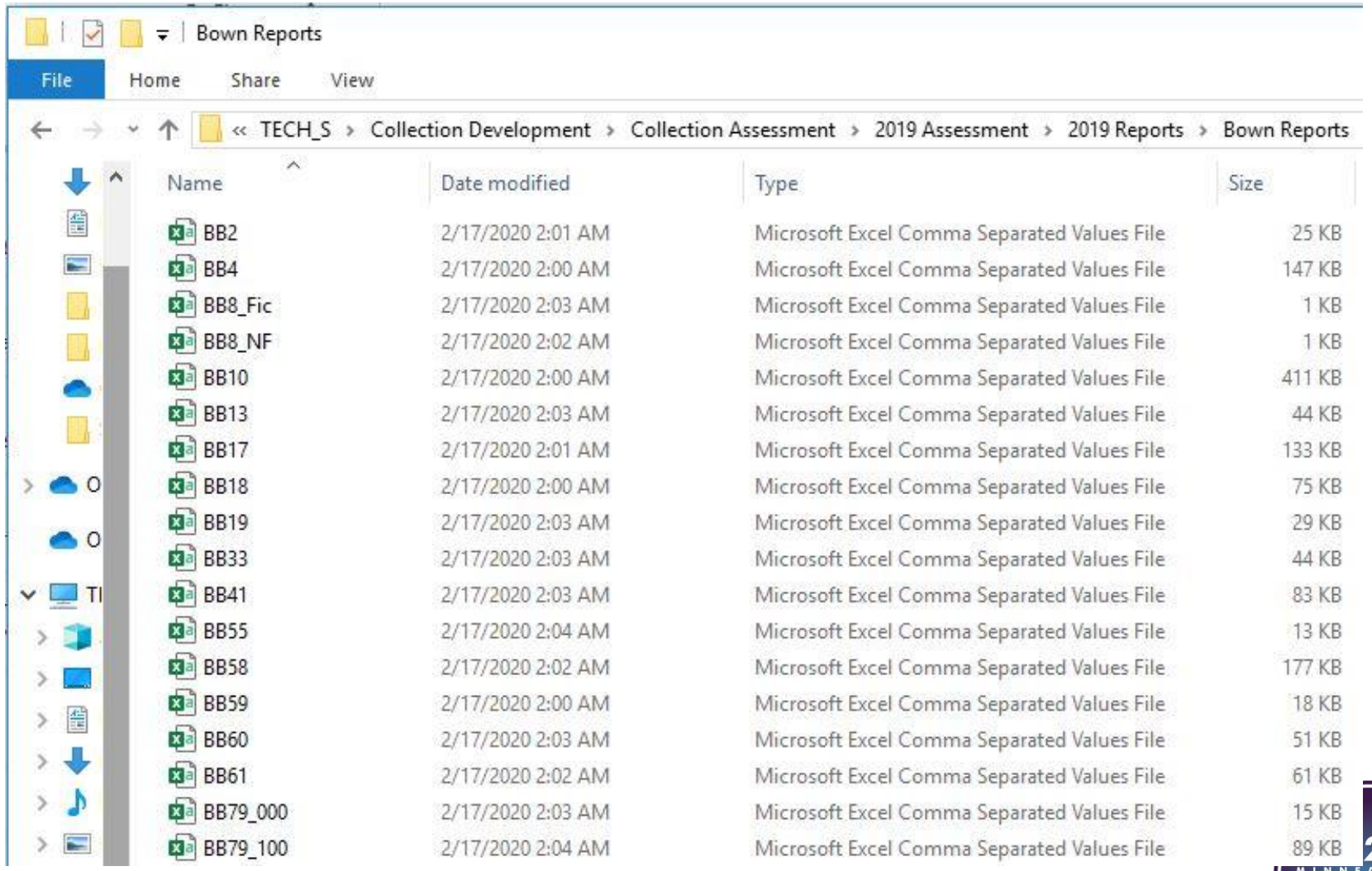
Example of subscription setup





Automated collection reports sent to folder in Windows

- Necessary for annual assessment
- Reports accessible outside Polaris Reporting Services for easier staff access



Background work benefits

Excel formulas pointed to specific cells and worksheets

- Percentages of collections were easier to see and auto calculated, so data was not mis-entered
- Individual collection files included statistics sheet with summary of collection, the raw data entered from automated reports, and a comparison sheet with three years of data

Automated reports and pre-entered formulas allowed us to complete the assessment in three days rather than three months

- Turned a huge project into a viable tool for annual use

Faster turnaround time meant more accurate statistics for collection development team and other stakeholders

- Branch managers were more interested in assessment because it was easy to see health and use of collections at their locations

Internal Results

Detailed collection analysis possible for collection development librarians

- More personal knowledge of collections and what is circulating vs what is not, at each location
- Data allows more precise decision-making based on circulation statistics

Branch managers and staff more invested in their collections after seeing hard data

- One location is using data to validate collection moves within the building (genre relocation to make flow easier for customers)
- Building displays targeting known high interest topics location specific
- Highlighting higher use after collection breakout (Easy Readers going into bins)

Funding designation – easier to see where more or less funds are needed

External Results

Presentation to Library Board of Trustees

- More accurate picture of what is circulating and why

Presentation to City data team

- How the library uses data

Justification for in-house collection development librarians and the work we do

- Personal collection analysis
- Cost-effective data

Raises profile of typically behind-the-scenes professionals

- Shows high-level accomplishments to influential stakeholders, such as board members, public officials, patrons

THANK YOU!

Questions?

Additional questions? Email us!

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