Collection Analysis Using EXCEL

By Ursula L. Benoit.

Have you ever wondered if your collection of graphic novels is really as popular as you think it is or if you have enough computer books to satisfy demand? Are you buying too many books in the 300's or what is the average age of the material in the 500's? How can you show your library's management that the collection of large print material is seriously aging and in need of a good weeding and rebuilding? Are you targeting your collection dollars in areas that need it most or are you basing decisions on gut feelings alone?
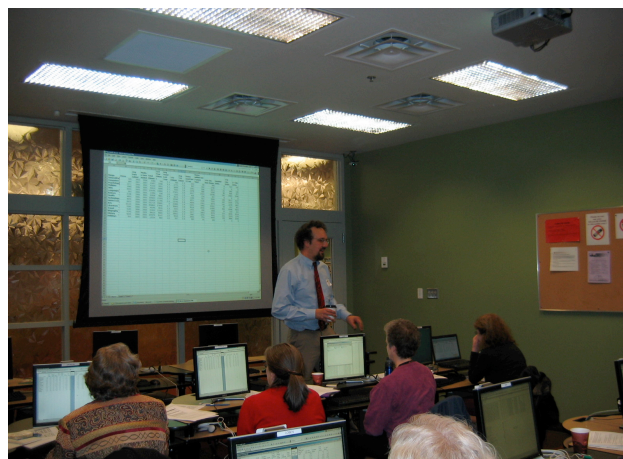
EXCEL and your ILS

We addressed these questions and more at a workshop entitled "Collection Analysis Using EXCEL" held on Friday November 27th, 2009 at the Richmond Public Library's Brighouse Branch. This useful and interesting workshop was organized by BCLA's Acquisitions and Collection Development interest group. The speaker was Tony Greiner. He (and co-author) Bob Cooper published the book "Analyzing Library Collection Use with EXCEL" in 2007. Using collection data supplied by the Greater Victoria Public Library, the group of 15 attendees learned the fine art of using EXCEL to make sense of what might otherwise appear to be overwhelming data available through your library's Integrated Library System (ILS).

Participants in the November workshop learn how to use EXCEL to analyze a library collection. Picture: Ursula L. Benoit

Tips and tricks

The process for gathering data through your library's ILS will depend of the type of system your library has (GEAC, SIRSI, Horizon, Millennium). Instructions for downloading data from the various systems can be found at excelbook.pbwiki.com. If instructions for your particular ILS is not there, and you know how to go about it, please send the instructions to Tony and he will include it (tony_greiner@hotmail.com).

Tony Greiner leads the "Collection Analysis Using EXCEL" workshop. Picture: Ursula L. Benoit

Exporting that data to EXCEL, removing unwanted information and creating consistent formats for things like dates can be achieved in EXCEL no matter what ILS your library has. Tony walked us through the many tips and tricks that he has learned over the years and pointed out the pitfalls that we are all sure to encounter when we take a close look at our libraries' cataloguing records.

Once the EXCEL file was clean, we were ready to start analyzing. We had a lot of fun learning how to discover such things as average and median publication dates, average use or turnover rate per item, total number of items added in the past year and the circulation information for those new items. The information could be used to analyze Dewey ranges, material types or to compare one location to another. Keeping this data for years and comparing the information over time will add value to your analysis.

Creating Charts

The final part of the workshop was spent learning how to convert the information into colourful charts and graphs. These are very useful graphic displays rendering otherwise dry numbers into visually meaningful representations that can really enhance any report.

The group was delighted with Tony's expertise and his willingness to spend part of his Thanksgiving weekend sharing it with us. I would also like to take this opportunity to thank the Richmond Public Library and its staff for arranging for us to use their computer lab and for making the luncheon arrangements. Many thanks also go to BCLA for its ongoing support of interest groups.

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