

## Partners Holds Audit – Baseline Data & Preliminary Findings

The initial sampling for this project was to investigate the implementation of GRABNGO collection for the Laurel Public Library but was expanded to be a report to the Partners group of the behavior of GRABNGO titles as they relate to holdable copies. There were not many constraints placed on the baseline data. All recommendations in the Preliminary Findings section are based on a goal of providing equity of access to all Partners patrons to the shared Partners collection.

### Baseline Data Methodology

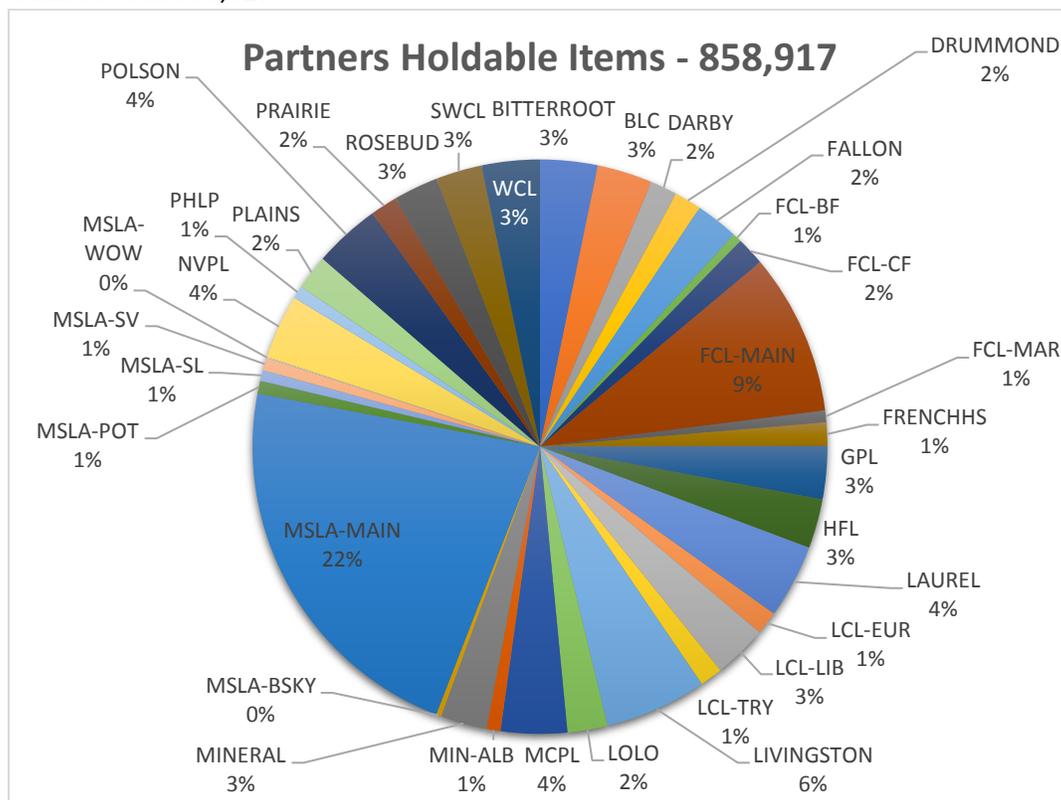
The partners collection was sampled from the period of August 3<sup>rd</sup> to September 21<sup>st</sup>. Where circulation totals are presented they refer to Fiscal Year 2018 Circulation, where holds totals are reported they correspond to an annualized metric based on a six-month period from February 1<sup>st</sup>, 2018 to July 31<sup>st</sup>, 2018. Due to the way holds data is archived in the ILS, there was not a way to get an entire year of holds filled and holds placed data broken down by library or Item Type. The sample period of six months was therefore doubled, for annualized totals, and the annualized total divided by 12 for monthly totals. Holds data is therefore aggregate data and not purely representative of any particular year. This data concession was needed in order to compare annual circulation to annual holds data. Holdable items are defined as items that have an Item type that allows holds throughout the entire sharing group, which does not include GRABNGO.

### Partners Shared Collection Data with Circulation, User and Holds Data

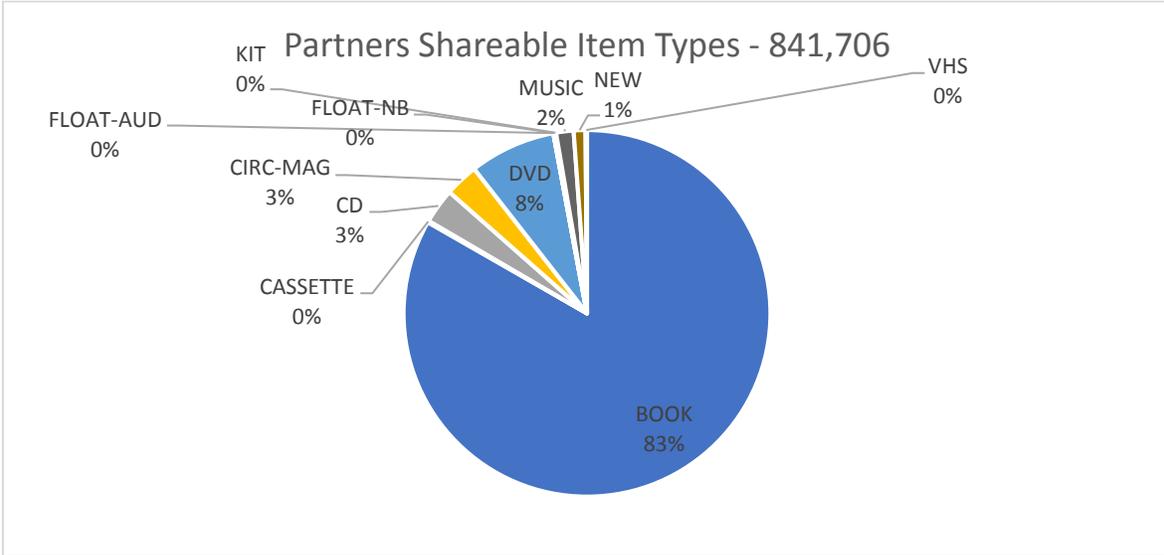
Partners Total Branches: 35 (not counting FCL-WF, as Lakeside is only a pickup location)

Total items (as of Aug. 3, 2018): 900,445

Total holdable items: 858,917

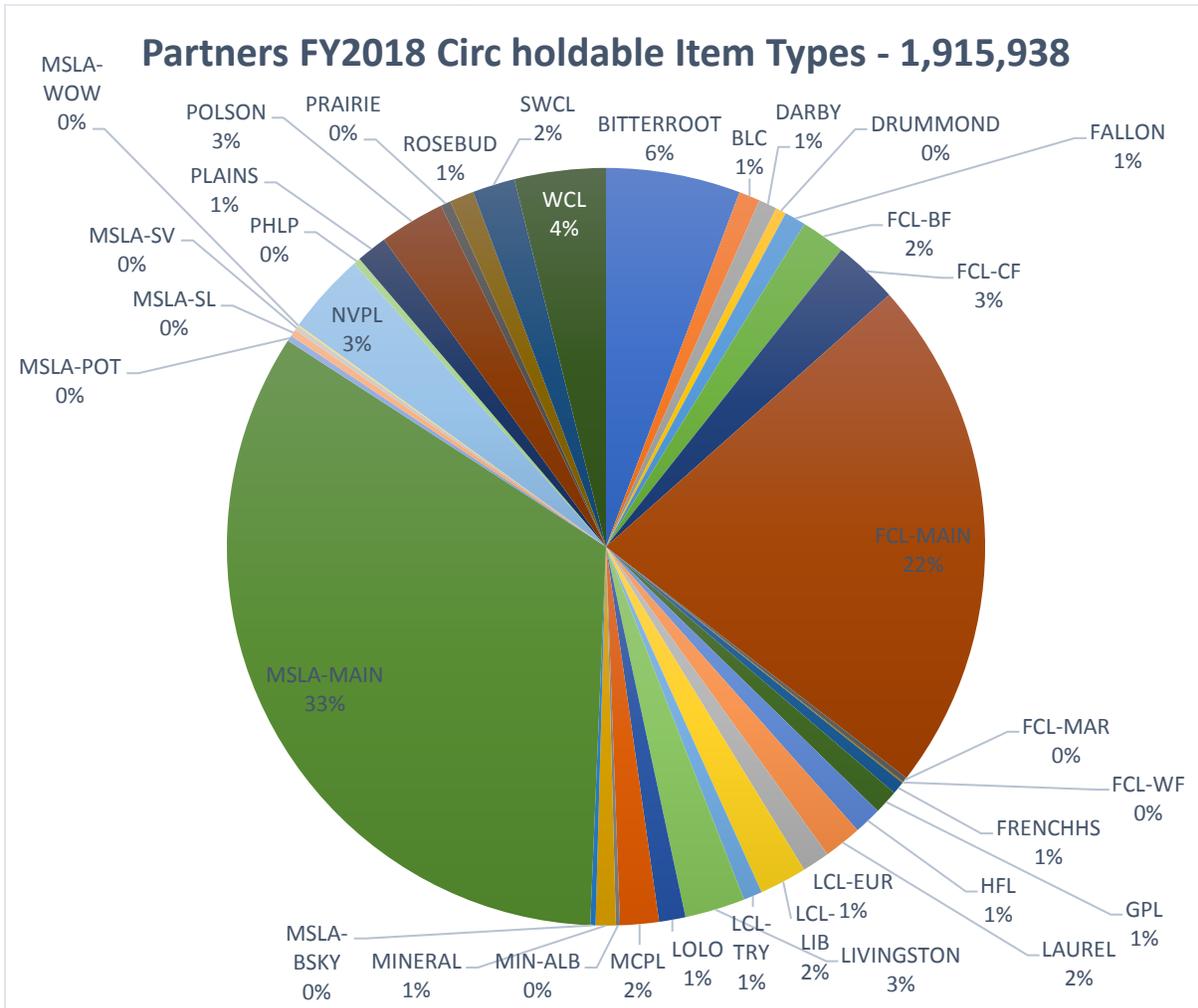


Total shareable items by Item Type: 841,706 (as specified in [Sharing Group Rules](#))

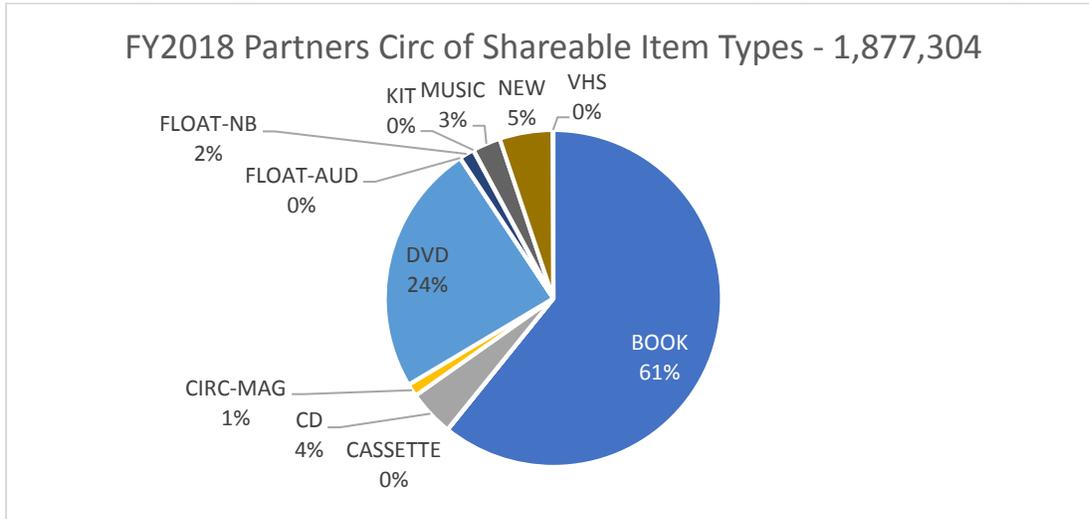


Total FY2018 Circ (all Item Types): 1,939,374

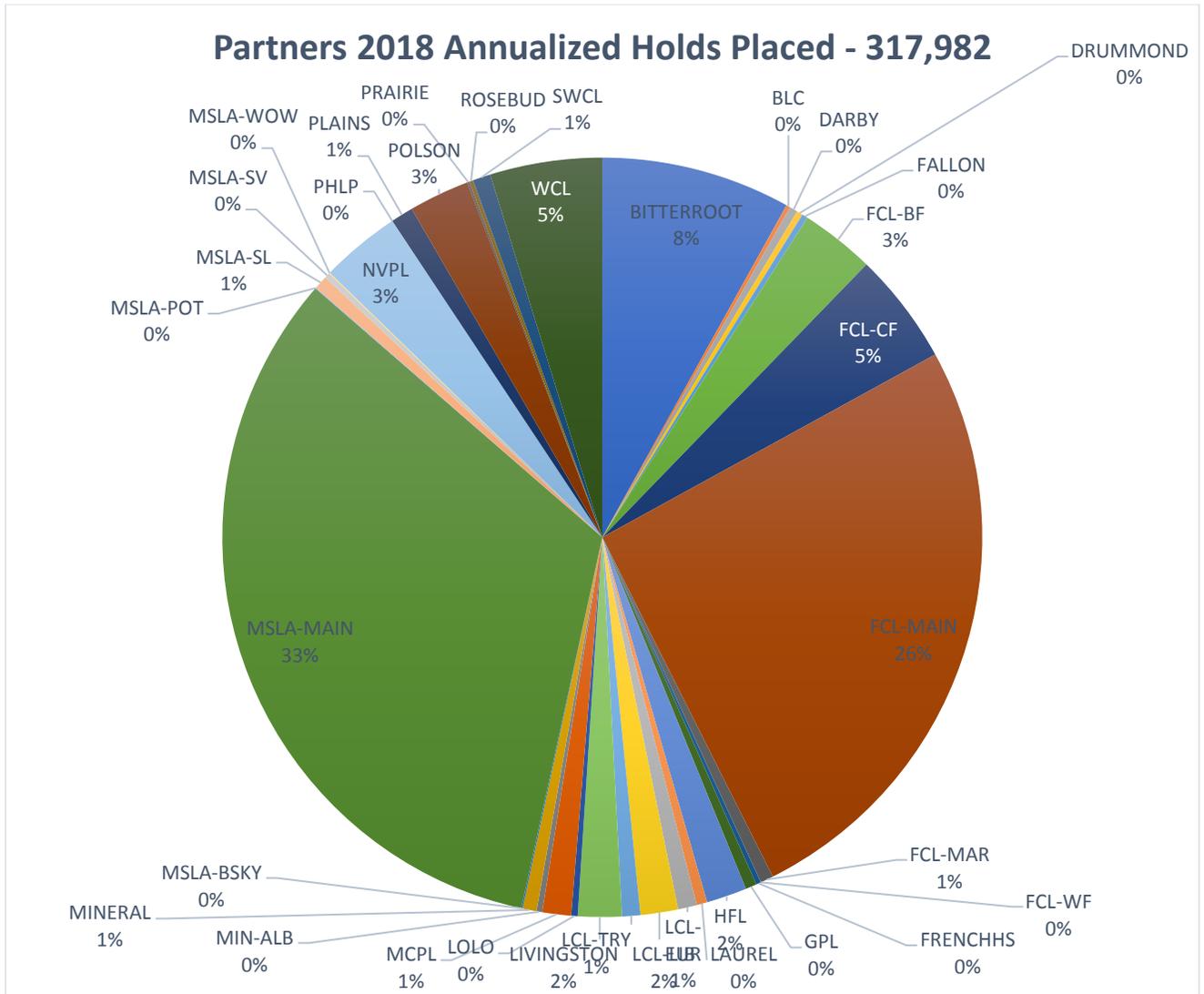
Total FY2018 Circ for all holdable Item types: 1,915,938



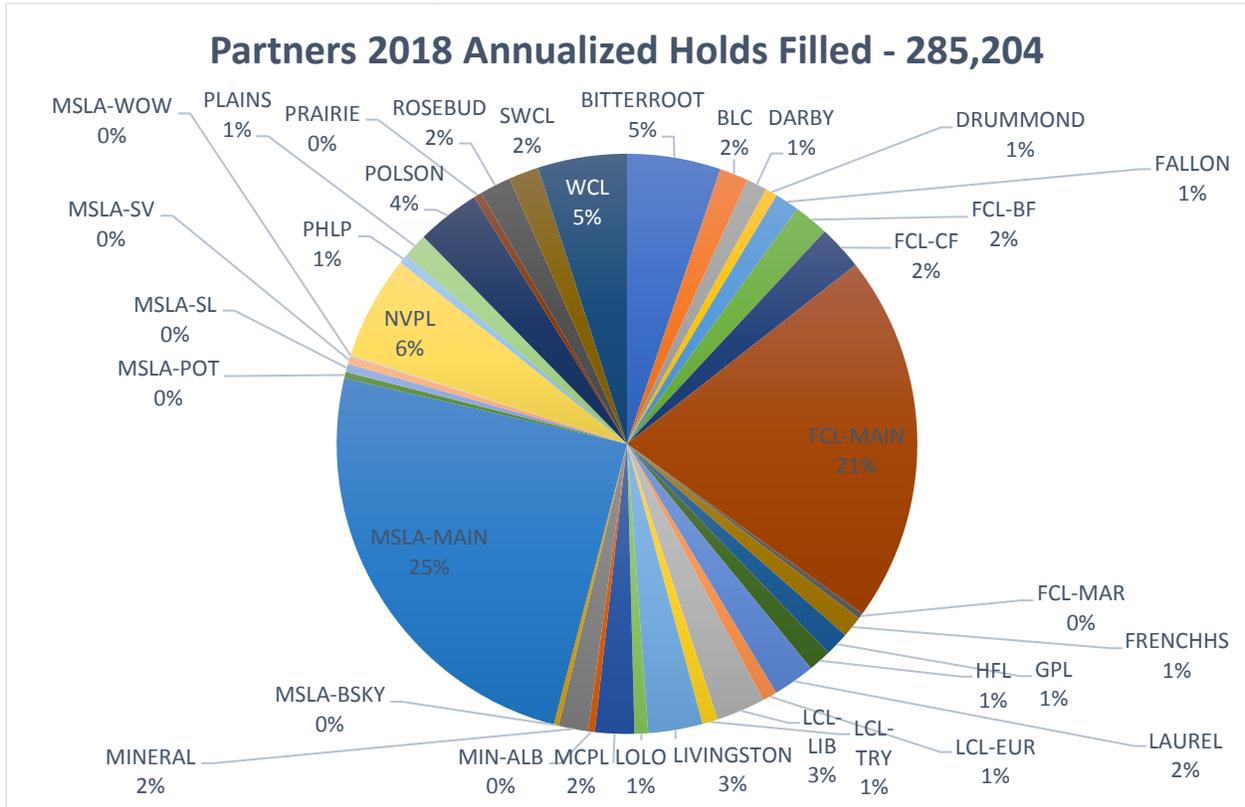
Total Circ by Item Type of Partners shareable items: 1,877,304 (as specified in [Sharing Group Rules](#))



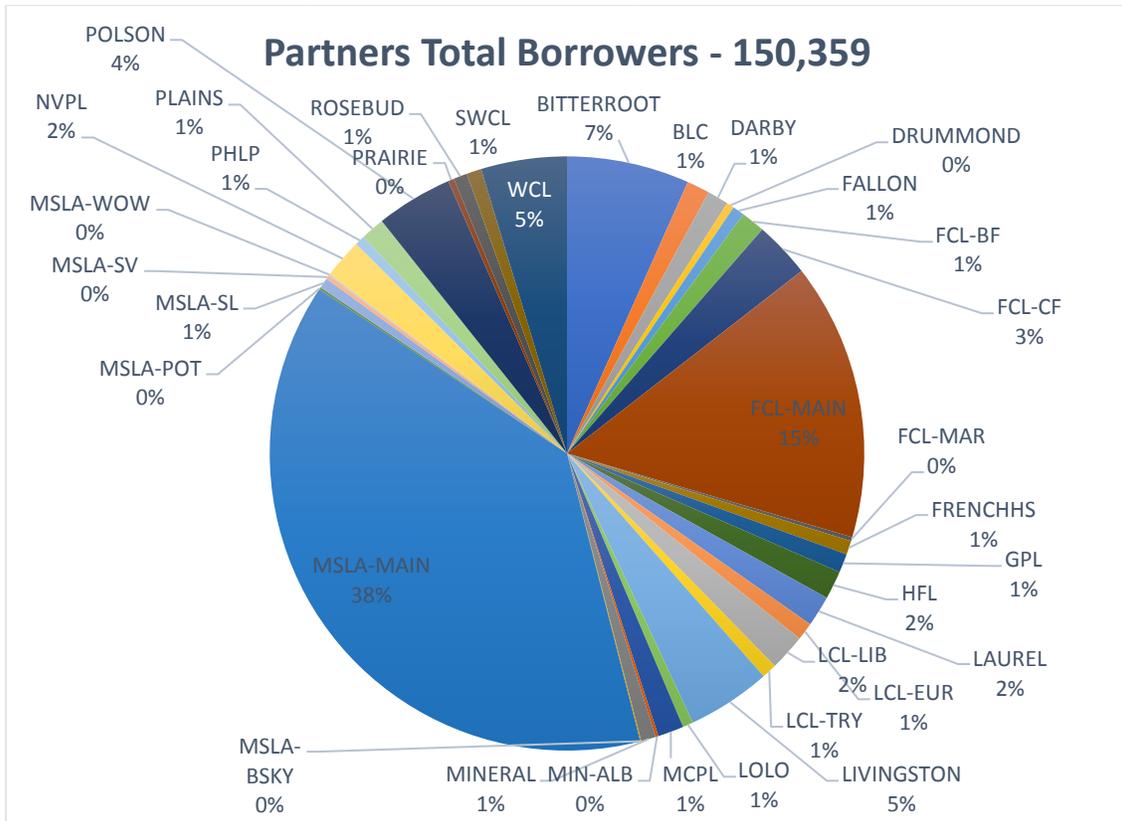
Total 2018 Annualized holds placed by User Library: 317,982 (includes expired and cancelled holds)



Total 2018 Annualized holds filled by Item Library: 285,204



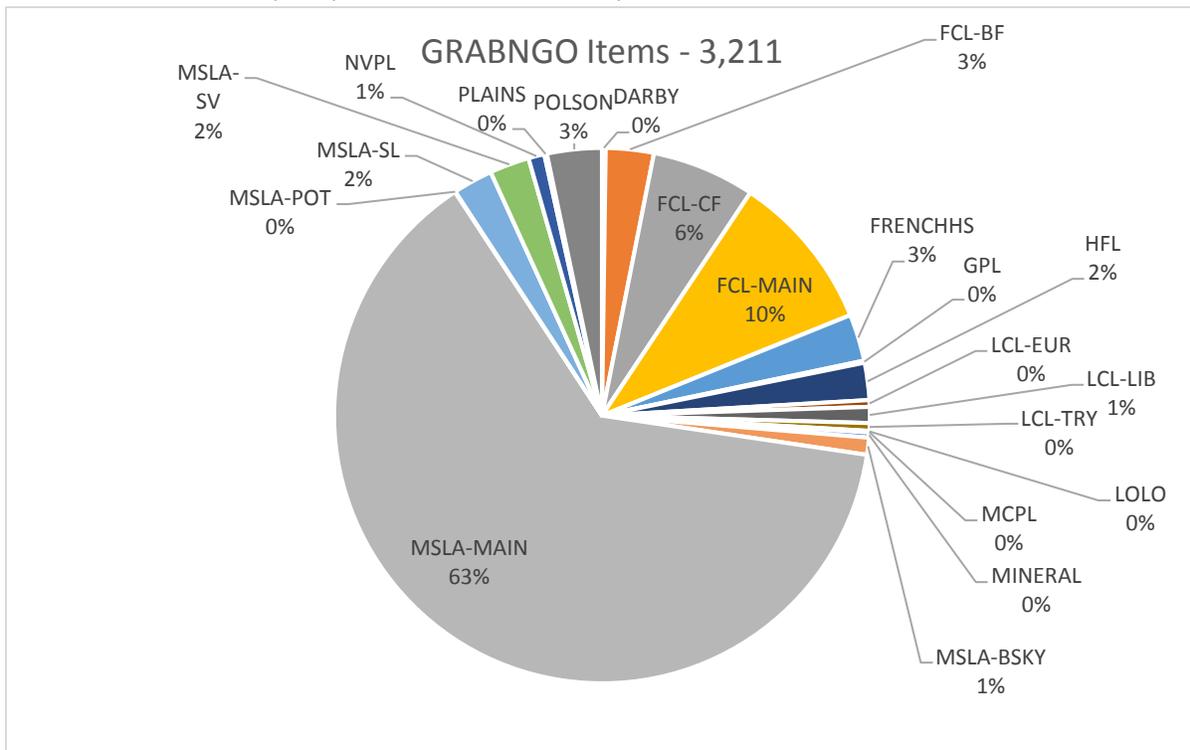
Total Partners users: 150,359 (minus system and ILL users)



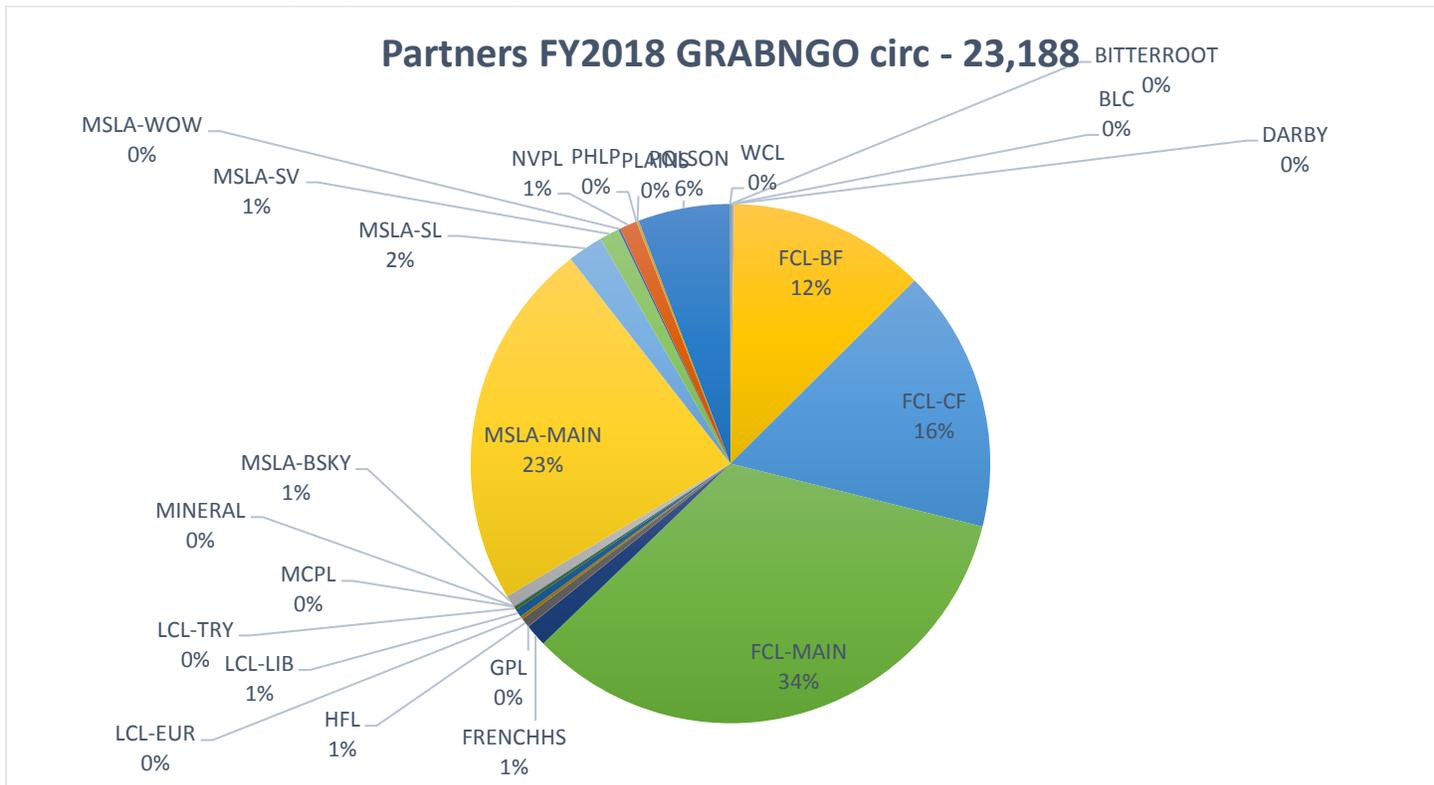
## GRABNGO Specific Data

Total partner Libraries with GRABNGO collections: 24

Total GRABNGO items: 3,211 ; 0.4% of holdable items, 0.3% of total items



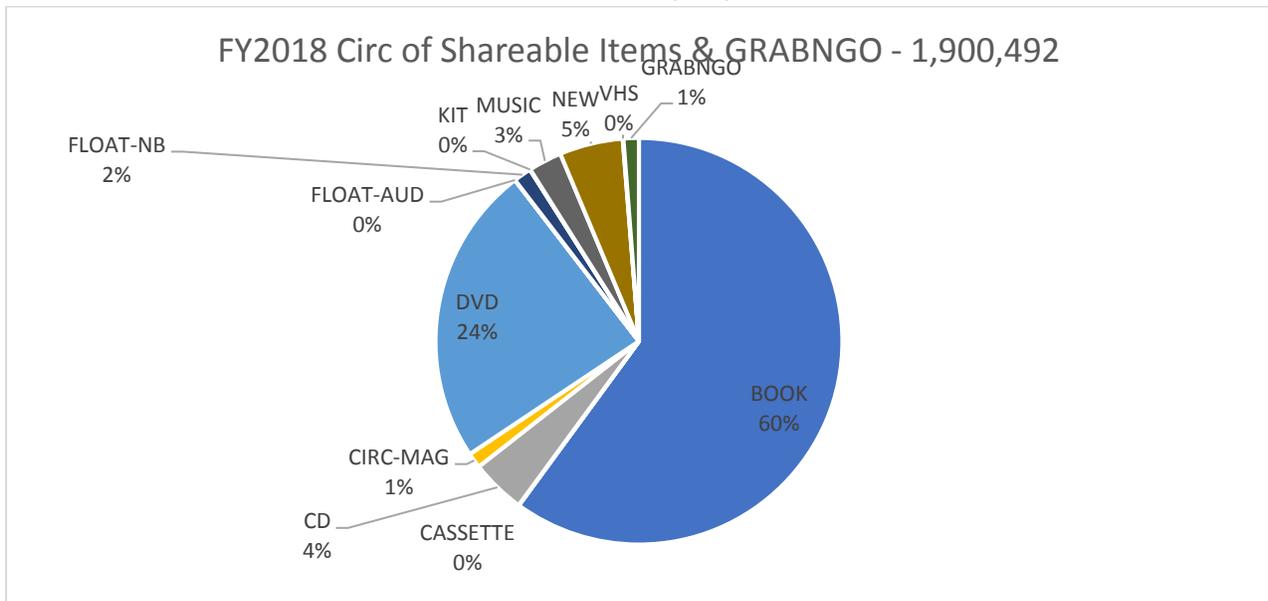
Total GRABNGO circ: 23,188 ; 1.2% of total, holdable & shareable item circ



GRABNGO items are non-holdable, they are both BOOKs and DVDs according to their Cat 1 data. They are not one-to-one copies of the NEW or FLOAT-NB items (9,905 total items), but roughly equivalent to CIRC-MAG items in circ and PROF-MAT items in number.

GRABNGO items have an average of 7.22 circs per item, while NEW items have an average of 10.97 circs per item. It is not possible to get hold to circ data by Item Type. Though GRABNGO items cannot be added to holds queues along with other NEW titles to fill holds, individual GRABNGO items do not have a higher circ per item than NEW books, meaning that they are not checking out to more patrons than regular NEW items. If GRABNGO items were all changed to NEW items they would circulate more overall across Partners.

FY2018 Circulation of Shareable items with GRABNGO: 1,900,492

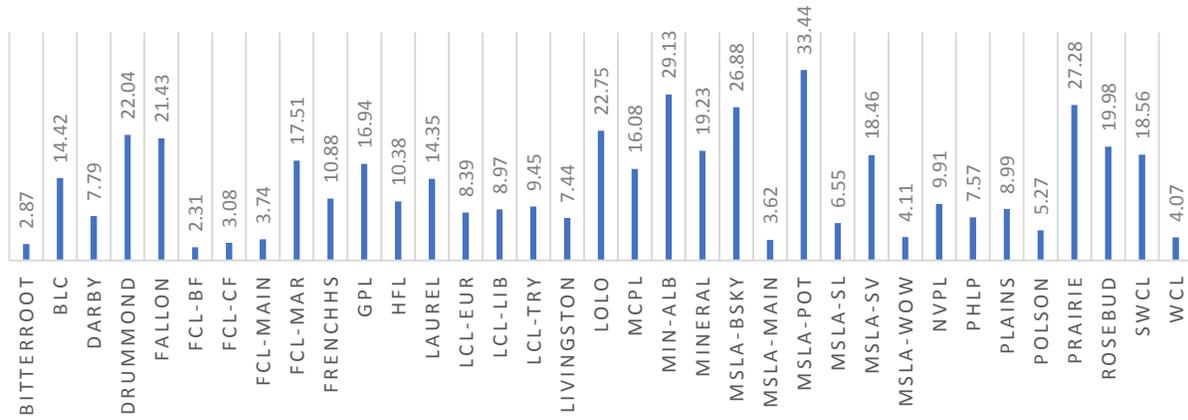


### Analysis Metrics

Graphs in this section describe items, holds, users or circulation in relation to another data point (i.e. Items to Users, compares the per library breakdown of items [900,445] to the number of users 150,359]). In all cases the median ratio is displayed, as averages are distorted by the larger libraries.

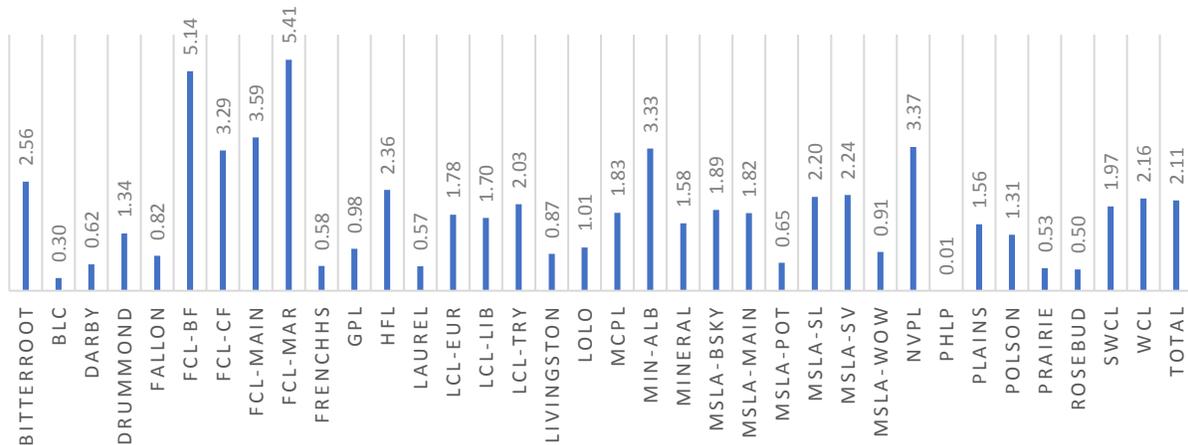
Item to User Ratio: 900,445 total items to 150,359 users

## PARTNERS ITEM TO USER RATIO - MEDIAN: 10.38



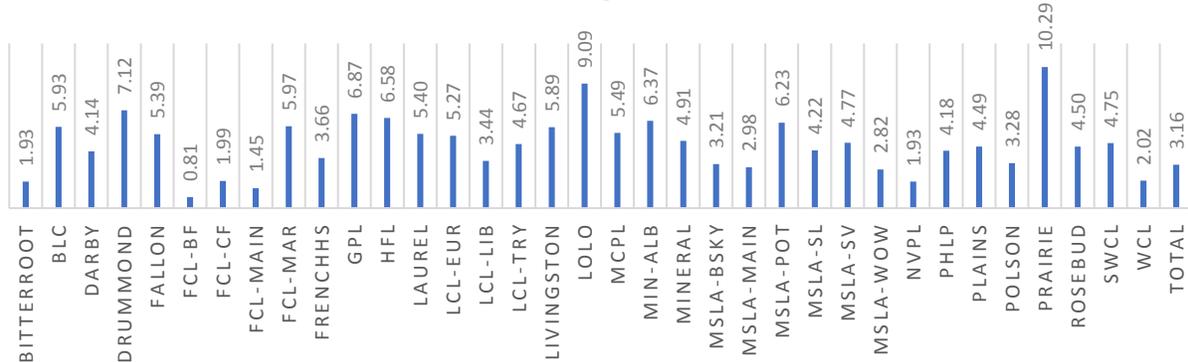
Average Holds Placed per User: 317,972 annualized holds placed by 150,359 users

## AVERAGE 2018 ANNUALIZED HOLDS PLACED PER USER - MEDIAN: 1.7



Average Holds Filled per User: 285,204 annualized holds filled by 900,445 items

## AVERAGE HOLDS SENT BY LIBRARY - MEDIAN 4.67



## Preliminary Findings

The data that is missing from this report is specific title holds data. Weekly snapshots of holds are being taken, but the sample period has not been long enough to draw conclusions. Throughout the sample period the same titles have been at the top of the holds queue with little movement upon which to draw conclusions.

Books designated as NEW, FLOAT-NB, and GRABNGO make up only 7.5% (146,014) of the overall FY2018 circulation (1,939,374) in Partners. These items are only 1.5% (13,227) of the total items (900,445) in Partners. The majority of circulation of items is still traditional books and media, not new items.

Filled holds (285,204) account for only 1.5% of the circulation of holdable items (1,915,938). The majority of circulation in every Partner library is not from filled holds but from onshelf browsing of items that are traditional books and media.

Concerns about popular items constantly being on hold are not unfounded. Preliminary snapshots of holds in Partners do suggest that the best way for patrons to get new items is to place a hold. For the most popular items, holds queues can be up to 150 patrons long, with Partners item totals for those titles barely keeping pace with the 4-to-1 holds ratio. Those libraries with holds placed below the Median of 1.7 are highly unlikely to have high demand items sent to their libraries.

Many libraries, and specifically those below the median 1.7 of holds placed, never purchase a copy of high demand titles. Therefore, the only way to have items travel to their library is for patrons or staff to place holds on their behalf. Hold sheltering titles at libraries where users place holds at greater than the median 1.7 of holds placed, removes popular titles from the overall sharing group.

A more equitable distribution of items to patrons would be to hold shelter popular titles for those libraries with holds placed below the median of 1.7. The ultimate question is how to design a hold sheltered collection for libraries that in many cases are not purchasing these high demand titles. It would be straightforward to set aside new books for only those libraries that have purchased them, but based on the distribution of titles, this would make it harder, not easier, for users needing these titles to get them.

More data from the holds snap shot portion of this study (to conclude on November 2<sup>nd</sup>) will be needed to make more specific recommendations. But based on this first round of sampling, MSC Admin's specific recommendation is to phase out the GRABNGO collections that currently are in use, to encourage libraries with lower than median holds placed to increase holds locally – even if this is done by staff on behalf of patrons – and to examine the efficacy of ordering new copies based on volatile holds queues that represent a very small portion of overall annual circulation.

Based on these preliminary findings, the Partners are welcomed to make further data collection recommendations.