Collection management and balance previously (here is where I give away my age) meant making sure your fiction titles were no more than 20 percent of the collection and that you weeded and brought in new material for your students and teachers. Today, the complexities of managing library collections has been both energized and compounded by the 21st century environment of multiple formats, learning styles, abilities, and cultures. We also live in an increasingly data driven environment where libraries are viewed through a bottom line lens and people ask if libraries are on the endangered species list. The reality is that libraries have survived and prospered because of their collections and our ability to change and adapt services to make collections accessible. However, collection management is no longer a simple matter of selecting and weeding; it is an issue of what meets the needs of our users, how to incorporate multiple elements, what technology is necessary for client access and productivity, and how to work with legislative decisions that affect material selections. All of this change and demand is happening at a time when budgets are leaving us with only the smile of the Cheshire Cat.

**DATA-BASED DECISION MAKING IS A NECESSITY**

At no time in my life did I wake up and think, “Yes! I want to spend time on statistics and data sets.” But the time came when I realized the absolute necessity of data-based decision-making in collection management. It can be so much fun looking at possible choices, but the reality was a collection of tens of thousands of items with no effective planning and monitoring process. I was flying by the seat of my pants with only a vague, non-quantifiable sense that the collection was okay and we were moving forward. I could weed with the best of them, I could select items of interest and use to the clients, but I did not unequivocally know if the collection was properly balanced for our environment.

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**DEFINING “BALANCED”**

The truth is that I did not understand the complexities of “balanced.” Using ratios to balance a collection assumes we know what we want balanced and how to measure that balance. It was clear spreadsheets were looming, but the questions of data types and goals remained unresolved. The starting point was clarifying that we are not a standalone support function; we are part of a team effort to reach quantifiable goals, and those overarching goals are set by the district and our building administration. That led to the question “What would it take for our library to be a significant contributor to those goals?” Obviously, such an analysis extends much farther than just to the collection, but making those determinations affected our collection process in surprising and profound ways.

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**QUESTIONS ARE EASIER THAN ANSWERS**

Determining the question was so much easier than finding the answer because the answer required groundwork, which took time and deep discussions. Before it was all done, we had a stakeholder analysis, mandates, a SWOT analysis, a formal five-year plan, and a mission and vision statement. Those documents revealed the essentials and clarified our thinking about aligned goals. Next came determining and prioritizing those goals. We disaggregated the goals into the necessary yearly actions to meet the goals. Whew! I knew the point of the plan was to keep us focused and thinking forward, not just caught in the moment, but the depth of the process was unexpected. The good news, however, is after the frontloading experience, all has been smooth, efficient, and quantifiable sailing, not just for our program, but for how we communicate and work with our administration.

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**TRANSFORMING GOALS INTO ACTIONS**

Creating a balanced collection in multiple formats with 24/7 availability of resources was one of our primary goals. We engaged in discussions about how to measure success, which meant determining how we define balance. Ultimately we created a matrix of elements that reflected our definition within our environment. This clarification process led to the formulation of a collection management policy that delineates our philosophy, defines terms, and identifies the methodologies used to achieve our goals. This policy is the guiding document for determining what statistics are necessary to create the assessment pieces.

Theory and policies are lovely only if they are practical in use. We do not have time to build the Golden Gate Bridge over the narrow Montana Missouri River. The statistics need to be clear, easy to create, and fulfill multiple functions. We begin the process each year by assigning budget amounts (determined by need and demand) to collection areas. This keeps us on track for meeting our collection goals. Once those amounts are determined, I use the following process to ensure the balance and budget numbers are in line with our decisions.
We do not have time to build the Golden Gate Bridge over the narrow Montana Missouri River. The statistics need to be clear, easy to create, and fulfill multiple functions.

**We use our electronic library management system to provide the statistics for circulation and collection totals by Dewey numbers, item types and formats, ILL and purchase requests, and holds. This provides the information for determining trends, and this informs our budget decisions. The system also allows us to track collection age by item type so we can compare demand with freshness. We use a rotation system to monitor and refresh the overall collection so it does not become stale or over-emphasized in areas. By weeding and making targeted acquisitions in pre-determined item types every year, we do not lose focus on our balance goal.**

**AN ONGOING TRACKING SYSTEM**

Here comes the part that takes the most time but is the single most helpful stat set for balancing purchases to match goals and defuse challenges. When we purchase, I use a spreadsheet that lists the title, author, ISBN, purchase source, review sources, and the classification for each item. Nonfiction and technology are easy to classify, but we also track the fiction purchases to balance them with client demand, emerging trends, and avoid neglecting or over-purchasing genres. For fiction titles I adopted the four category approach used in the ALA’s *Handbook for Readers’ Advisory*. The tracking spreadsheet is simple and allows the flexibility to add and subtract categories for tracking specific areas, such as Native American materials mandated by the Montana Indian Education for All Act, or the GLBTQ titles for parity.

When the last order for the year is received, I do a tally sheet for all item types and enter those tallies in yearly columns for comparison purposes. We have instant verification that we are staying focused and spending the budget as predetermined. Also, when we are getting ready to talk with the administration, I can redact specific areas and create charts or graphs to statistically illustrate the progress toward goals. This presentation makes an impact because we can document the process from start to finish. In turn, our administration has confidence in our efficacy and professionalism.

**EXCERPTS FROM THE BISONLIBRARY COLLECTION MANAGEMENT POLICY**

BisonLibrary is committed to the principles of intellectual freedom and representation of all cultures, learning styles, ability levels, curricular needs, and personal interests.

A quality collection can be defined as one that matches the library purpose; the district and building goals; and the client demand. Determining the size and balance of the collection must be analyzed through these filters to determine the collection sizes and formats that best meet the needs and goals of Great Falls High School.

BisonLibrary sets collection percentages within fiction and nonfiction based on a paradigm of curriculum need, format, user statistics, requests, trends, and differentiation needs. Each area is assigned a budget percentage based on the importance of support, format, and demand needs. These values are subject to yearly change based on projected needs, changes in curriculum, building and district programs, and goals. In addition to the immediate needs of each year, the entire collection is assessed on a four to five year rotation system to ensure that the currency and the responsiveness of the material match the needs and demands.

**THE “ART” OF DATA IN COLLECTION MANAGEMENT**

This process may feel intimidating in the beginning, but it absolutely clarifies your thinking and informs your decision-making with confidence built on a foundation of philosophical determinations and statistical assessments. We no longer lose future focus in the day to day details that consume the majority of our time, and we know the library is moving forward with planned purpose. My heart will always belong to stories and matching patrons with desires, but never did I dream that statistics are an art that would make that process more elegant and successful.

BJ McCracken is a librarian and the department chair at Great Falls (Montana) High School’s BisonLibrary. She is also an ALA member and intern on the Web Advisory Committee, AASL, YALSA, IFRT and LIRT. She is a member of the Montana Library Association and MLA Intellectual Freedom Committee (also former chair). She may be reached at bj_mccracken@gfps.k12.mt.us.