How to Allocate Your Collection Development Funds Using Supply and Demand
...and the Excel Tricks You’ll Need to Keep Your Sanity
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How To Include Demand
In your ILS, generate a list of circulation statistics for all your circulating monographs. Use a minimum of four years to capture spikes in demand from classes that are taught irregularly. To keep your data set manageable, eliminate items with zero circulation.

Now comes the time-consuming part: Assign each book the fund code that would apply if it were to be purchased today. Sort by call number to get the books loosely arranged into subject areas. Some ranges translate easily, and the fund code information may already be encoded in the profile you have with your book supplier.

Other ranges do not translate easily, particularly when it comes to interdisciplinary areas like the G and H. Scrutiny at the title level will sometimes be necessary, and even then, you may need to make a guess and move on. Should a book on the History of Women in Music go under the history fund, the women’s studies fund, or the music fund? Deliberating too long on too many titles will lead to madness.

It’s best to apply fund codes to as many ranges as you comfortably can, because it takes time and mental energy to examine the oddball ranges and quirky titles.

After assigning fund codes, you should reduce your call numbers to a workable size by truncating them. Insert a column to the right of your call numbers with this formula (which assumes the first call number is in A1):

=LEFT(A1,5)

Now you can take the final step of tallying the number of circulations per fund code. Use a Pivot Table to easily generate the numbers.

How To Include Supply
If you use YFR, log in to GOBI and click the link Publisher Lists, New Title Report on the left side. Otherwise, contact your primary book vendor for information about subject availability.

This information will point to recent publishing trends in academia. If, for example, books were published last year, a perennially popular subject like history might have two or three hundred titles, while kinesian law may have little or no representation.

You will need to translate the data about recent publications from Library of Congress Call Numbers for each of your local fund codes (discussed further in the next section). Set up your formulas in Excel to cover each fund code and each LC call number (first two letters only):

Count of Fund Codes with LC call number

Books recently published x with that LC call number

All instances of that fund code

Total books recently published

Tip: Use a Pivot Table in Excel to easily count fund codes.

Highlight alternating rows
This is an optional step, but it can make large data sets easier to read.

Select the rows you want to highlight, or type `CTRL+ALT+` to select all

1. Go to Conditional Formatting
2. Click on New Rule
3. In the popup box, choose “Use a formula to determine which cells to format”
4. Enter the formula: `=MOD(ROW(),2)`
5. Click the Format button to choose a fill color
6. Click OK

If you change your mind:
1. Go to Conditional Formatting
2. Click on Clear Rules
3. Choose Clear Rules from Entire Sheet

Keyword Searching and Sorting
This is essential for squarely disciplines that do not fit neatly into call number ranges. If you have a fund for LGBTQ, for instance, you will want to apply this method to keywords such as Lesbian, Gay, Bisexual, Transgender, and Queer (as well as words that have fallen out of favor, like Homosexual, which will still be represented in older titles).

1. `CTRL+F`
2. Type `lesbian`
3. Click on Replace
4. Type `lesbian`
5. Click on Format
6. Click on Font
7. Change the text color to red and click OK
8. Click on Replace All
9. Sort your Title column to bring red words to the top

Now you can easily assign the LGBTQ fund code to every book with `lesbian` in the title.

Essential Shortcuts
- `CTRL+D` – copy the information from the cell above
- `CTRL+M` – jump to the first cell in the right that’s empty
- `CTRL+←` – shift select all the cells to the right (until the first empty cell)
- `CTRL+↓` – select all the cells below (until the first empty cell)
- Double-click the lower right corner of a cell – fill in the remainder of the column with the same information

Sort by LC Call Number
Penn State University maintains instructions on its website for sorting by Library of Congress Call Number in Excel.

http://www.lib.psu.edu/css/email/callnumberreport.html

Because of professional courtesy and copyright law, those instructions are not reproduced here. Follow the link or google for the information. The code is ugly but the instructions are easy to follow. It is invaluable for any project that uses LC Call Numbers in a spreadsheet.