



## Relevant Citations

Aguilar, William. (1986) "The Application of Relative Use and Interlibrary Demand in Collection Development." *Collection Management*, 8:1, 15-24.

- This is the article that started it all. It talks about three types of collection assessment: quantitative, qualitative and use factors. It gives definitions for Bonn's Use Factor and Ratio of Borrowings to Holdings.

Bonn, George S. (1974) "Evaluation of the Collection." *Library Trends*, 22, 265-304.

- Bonn talks about his use factor on page 273.

Carrigan, Dennis P. (1992) "Improving Return on Investment: A Proposal for Allocating the Book Budget." *Journal of Academic Librarianship*, 18:5, 292-297.

- Carrigan advocates using Bonn's use factor but doesn't explain how.

## Formula Simplified? Or Not...

4 yr average Bonn's Use Factor + % of average price per book = A



$A \div \text{Sum of A} = A\%$



$A\% \times \text{Total Funds} = \text{Individual Fund Allocation}$

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Using a Use Factor  
Measure to Assign  
Allocations to Subject  
Based Firm Order Funds

Recreating at your  
library

Acquisitions Institute at  
Timberline Lodge  
May 20, 2013





## If you want to try this with your collection, here are some suggestions

Bonn's Use Factor is the percentage of circulations of a particular collection divided by the percentage of holdings that collection represents. It can be applied to small sub-collections and large collections alike.

1. Figure out what you're going to count. We counted our main stacks collection, media, music collection, oversize items and our Dewey collection of children's books.
2. Use titles or items. We chose to use items because it seemed a truer count.
3. What are you going to count as a circulation? Our ILS system includes ILL, distance education uses, renewals and reserves. You might be able to include in-house data, too.
4. Devise a way to divide up your collections. Our collection is primarily in LC so we used a spreadsheet that crosswalked sections of LC to fund codes.
5. Choose the year spans you want to cover. We suggest doing at least three fiscal years when working with print books.
6. Run reports that group items acquired in each of your fiscal years with circulations from acquisition to present sorted by call number.
7. Arrange your call numbers into logical groupings that represent subjects/departments/fund codes that coincide with how you divide your firm order money.
8. Get a sum of all items for each year.
9. Divide the number of items for each fund code by the sum of items for that year. That gets you the percentage of holdings.
10. Sum the circs.
11. Divide the circs for each fund code by the sum of all circs for that year. That gets you the percentage of circs.
12. Divide the percentage of circs by the percentage of holdings to arrive at Bonn's Use Factor.
13. Repeat steps 9-12 for each fiscal year.
14. Average Bonn's Use Factor across your fiscal years.
15. Decide how you're going to get your average cost per item data and divide it into fund code areas.
16. Sum your average cost per item data.
17. Divide each average cost per item by the sum of cost per item to find the percentage paid per item.
18. Add your averaged Bonn's Use Factor and the percentage paid per item for each fund code section.
19. The Use Factor plus price divided by the sum of Use Factor plus price gives you the percent of overall allocation each fund is entitled to receive.
20. To assign an allocation to each fund, multiply the total amount available by the percent each fund is entitled to.