Redefine Inventory
Work Smarter

MUG 2011 Conference
September 22-23, 2011
Grand Junction, Colorado
Who are we?

Carol Gyger
ILS Coordinator and Acting IT Manager
Poudre River Public Library District
cgyger@poudrelibraries.org

Shana Brown
Former Library Services Representative (Circ)
Poudre River Public Library District
ealalaith@gmail.com
Quick facts about us

- Public Library
- 3 branches, 1 small offsite storage facility
- 140K patrons
- 430K items
- 3.3 million circs in 2010
- Reserve Book Room
- All items are barcoded and RFID tagged
- Float/share most collections
Who are you?

- Systems staff
- Circulation
- Reference/Selectors
- Other

- Public Library
- Academic Library
- School District
Why we do inventory

- **Our mission:** To provide easy access to our materials
  - Good customer service
  - Pretty accurate database
  - Confidence in our database
Things fall through the cracks

- Mislabeled
- Misshelved within library
- Miscoded (e.g. wrong location code)
- Walked out the door
- Discarded improperly
- On shelf but not checked in
What we’ve done

A. Barcode scanning method
   ◦ Scan every item on the shelf
   ◦ It takes a while
   ◦ Used this method for years

B. RFID scanning method
   ◦ Scan every item on the shelf
   ◦ This also takes a while
   ◦ Tried to use this method for 2 years

C. Redefined inventory
   ◦ Reevaluated
   ◦ Holistic approach
Method A - Barcode scanning

With a Percon scanner
Method A - Barcode scanning

With a laptop and barcode scanner
Method B – RFID scanning

Big Blue
Method C – Redefined and Smarter

- There is more than one way to skin a cat

- Working smarter means getting the same result with fewer steps, less staff time, less brain damage
Weeding Woman and Maintenance Man’s Top 10
WW and MM’s Top 10

1. Weeding
2. Weeding
3. Maintenance
4. Maintenance
5. Maintenance
6. Maintenance
7. Barcode scanning
8. Barcode scanning
9. Philosophy
10. Philosophy
Categories:

- Circulating collections
  - Majority of our holdings

- Non-circulating collections
  - Reference

- High concern areas
  - Reddots
  - DVDs and CDs
  - Other
Strategy #1 Weeding Policy

- **Need circulation-based weeding policy**
  - Weeding is as good as doing a full-scan inventory every __ years
  - Pick a number between 1 & 10
  - We picked 3

- **Using this method you will find truly missing items**
  - Not circ’ed AND
  - No longer on your shelves
Weeding Methods

Millennium Create Lists

Good
- Need Create Lists, Excel, Global Update and decisions!

Better
- Need Create Lists, Excel, a Crew Manual and decisions!

collectionHQ
Best
- Need collectionHQ service, Excel and decisions!
Millennium Create Lists – “Good”

Create

- Create list of what hasn’t circ’ed in 3 years
- Change all to “w” status (withdrawn)
- Create search report in Excel

Search

- Search → Find → Stamp discard → Outta here
- Search → don’t find → no problem, see below

Delete

- All items on “w” status are deleted
- from the database at next quarterly
- batch delete, whether found or not
Not circ’ed in at least 3 years

ITEM CREATED less than or equal to "04-16-2008"
AND ITEM LCHKIN less than or equal to "04-16-2008"
AND ITEM STATUS equal to "-
AND ITEM OUT DATE equal to " - - "

Sort by loc, call#, author, title

Export – barcode, loc, call#, title
Weeding Methods with Lagniappe

Crew Method
- Same as above PLUS more
- Create lists are more complex than simple “not circ’ed in 3 years” (# of circs, Dewey range)
- Collection development
- Need Create Lists, Excel, a Crew Manual

collectionHQ
- Similar to above PLUS more
Strategy #2 Weeding by condition

- Vibrant, relevant collection

WARNING: Always consult your selector before beginning the weeding process. Not doing so can damage your workplace relationships and can be a hazard to your health. Pregnant or nursing women should blah blah blah blah blah blah blah.
Fewer cracks

- Mislabeled
- Misshelved within library
- Miscoded (e.g. wrong location code)
- Discarded improperly
- Walk out the door
- On shelf but not checked in
Strategy #3 Shelf Reading

just do it.
Strategy #4 Frequent Search Report

- Use the “Wine and Cheese” Strategy
  - We do bi-weekly reports
  - Aged 2 weeks

- Missing and in transit WITH HOLDS

- Our list is about 50 items

- You need Create Lists, Excel
Create List Recipe

Missing WITH HOLDS

(ITEM STATUS equal to "m" OR ITEM STATUS equal to "t"
OR ITEM STATUS equal to "z")

AND ITEM HOLD exist

AND ITEM UPDATED greater than or equal to "08-10-2011"

AND ITEM UPDATED less than or equal to "08-31-2011"

Sort by loc, call#, author, title

Export – barcode, loc, call#, title
Strategy #5
The safety net

- Missing, NO HOLDS
- Search all branches
- Delete quarterly
- Keeps database clean
- Deletes are done using “Wine and Cheese Strategy” - aged 6 months
Create List Recipe

Missing NO HOLD

(ITEM STATUS equal to "m" OR ITEM STATUS equal to "t" OR ITEM STATUS equal to "z")
AND ITEM UPDATED greater than or equal to "02-04-2011"
AND ITEM UPDATED less than or equal to "05-25-2011"

Sort by loc, call#, author, title

Export – barcode, loc, call#, title
Strategy #6 Claimed Returned

- Create list
- Check for billed items, use pending status
- Search each branch twice
- Follow up with patrons
- Repeat

“I know I returned that!!!”
Create List Recipe

Claimed Returned

ITEM STATUS equal to "z"
AND PATRON NOTE has "claimed return"

Sort by loc, call #, author, title

Export – barcode, loc, call #, title
Fewer cracks

- Mislabeled
- Misshelved within library
- Miscoded (e.g. wrong location code)
- Discarded improperly
- On shelf but not checked in
- Walk out the door
Strategy #7 Barcode Scanning
Non-circulating and High Concern Areas:

- **What**
  - Reference (Every 3 years)
  - DVD’s, CD’s, etc. (every 6 months)
  - Other? (As needed)

- **How**
  - Batch/in stacks/comprehensive inventory
  - Scan entire section
  - What’s missing?
Strategy #8 Barcode Scanning With Exceptions Report

Unique problem:

Changing location codes + High turnover

= Mislabeled items
Unique Solution

• What
  ◦ Reddot collection – looking for items that have changed to regular loc code but still have reddot on the spine

• How
  ◦ Scan all on-shelf items
  ◦ What doesn’t belong?

• Frequency
  ◦ Every 6 months
  ◦ Evaluate after 1 year
Fewest cracks

Mislabeled

Misshelved within library

Miscoded (e.g. wrong location code)

Walk out the door

Discarded improperly

On shelf but not checked in
Strategy #9 Collaborate and Be Flexible

• For best results, involve:
  ◦ Systems
  ◦ Circulation
  ◦ Collection Development/Selectors
  ◦ Public Desk

• Be prepared to:
  ◦ Customize your procedures
  ◦ Change your plan when the first one doesn’t work out
Strategy #10 Constant Vigilance!

- Trust your staff to find problem items
- Material Handlers know the collection and mislabeled items often “jump” out at them
- Keep your eyes peeled for anything out of place and take care of it right away
WW and MM’s Top 10

1. Circ based weeding policy
2. Weeding by condition
3. Shelf reading
4. Missing WITH holds search report
5. Missing, NO holds search report
6. Claimed returned search report
7. Barcode scanning (no exceptions)
8. Barcode scanning (exceptions)
9. Collaborate and be flexible
10. Constant vigilance!
Efficient and effective ‘R’ Us

- Embraced circulation-based weeding policy
- Dumped 95% of in-the-stacks scanning
- Targeting high concern areas only
- Effective Search Reports – better customer service

- **A few stats - estimates**
  - Methods A and B
    - In stack scanning 1,000 – 1,500 items/hour
  - Method C
    - 1/3 the time of comprehensive inventory
      - (Scanning every single item)
Evaluate what you do now

- Can we be more efficient?
- Are we using best practices for weeding?
- Who is doing what?
- Overlap?

- Motto – Let’s look at that...
Your Inventory Strategy

- **Circulating collections**
  - Circulation-based weeding policy – Work it!
  - Good maintenance techniques

- **Non-circulating collections**
  - Scan everything on shelf
  - Just do it – once in a while

- **High concern areas**
  - Scan everything on shelf
  - Just do it – more often
Questions?

Carol Gyger
ILS Coordinator and Acting IT Manager
Poudre River Public Library District
quiry@poudrelibraries.org

Shana Brown
Former Library Services Representative (Circ)
Poudre River Public Library District
ealalaith@gmail.com