

Redefine Inventory Work Smarter



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Who are we?

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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

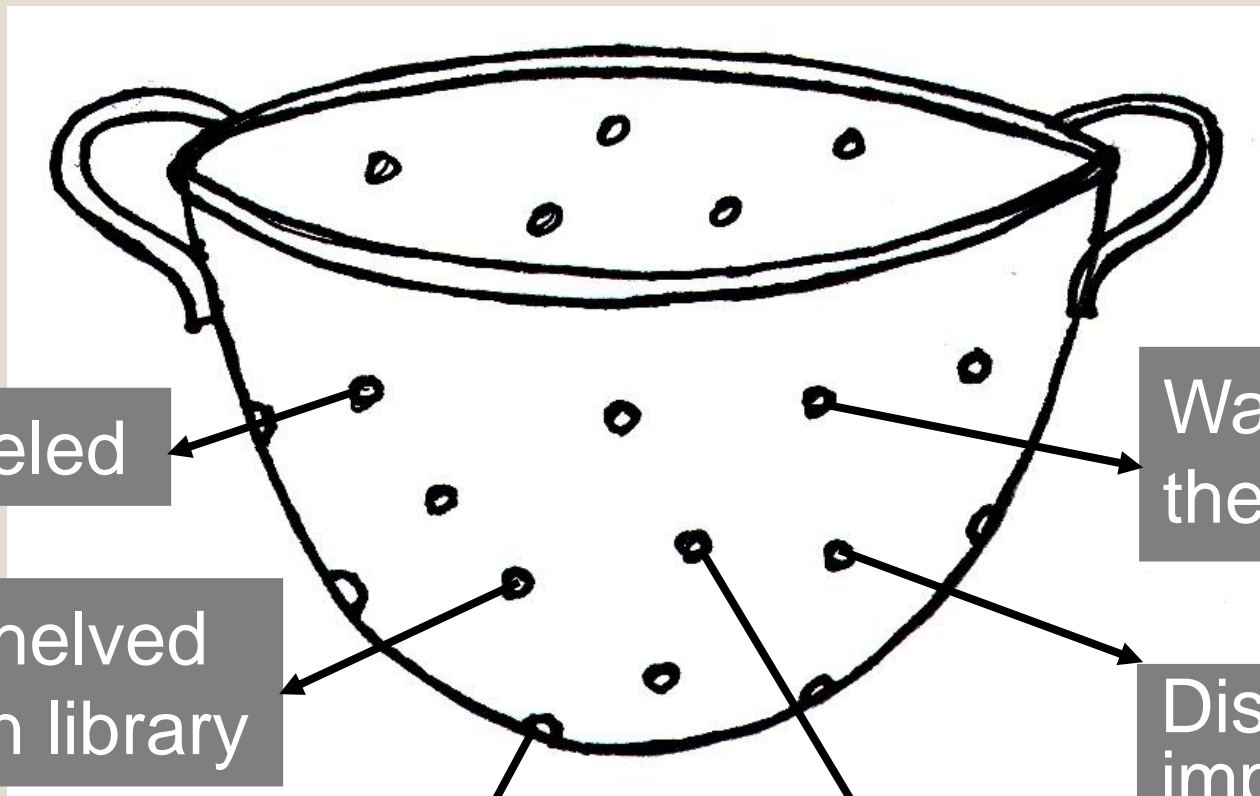
Who are you?

- 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

Walk out the door

Misshelved within library

Discarded improperly

Miscoded
(e.g. wrong location code)

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



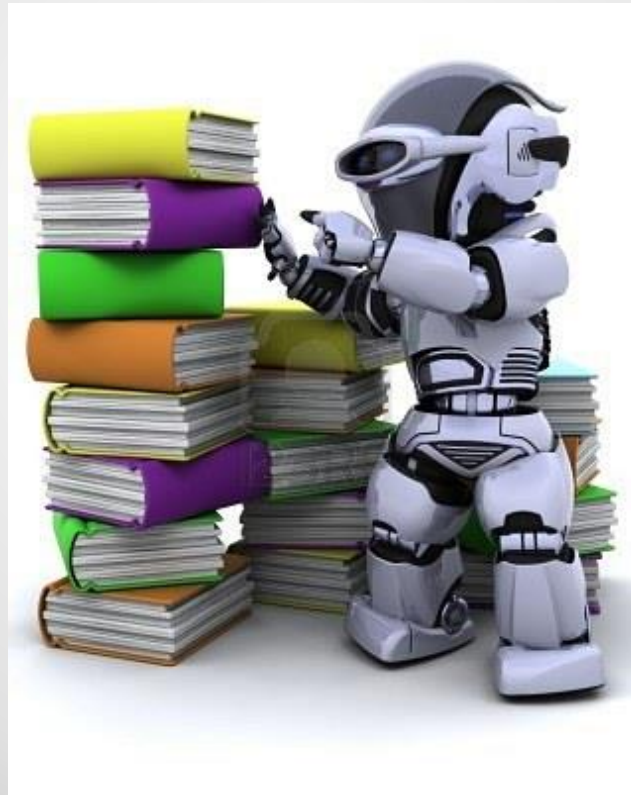
Big
Blue



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



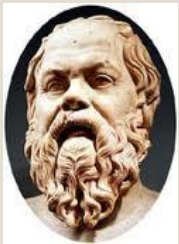
5. Maintenance

6. Maintenance



7. Barcode scanning

8. Barcode scanning

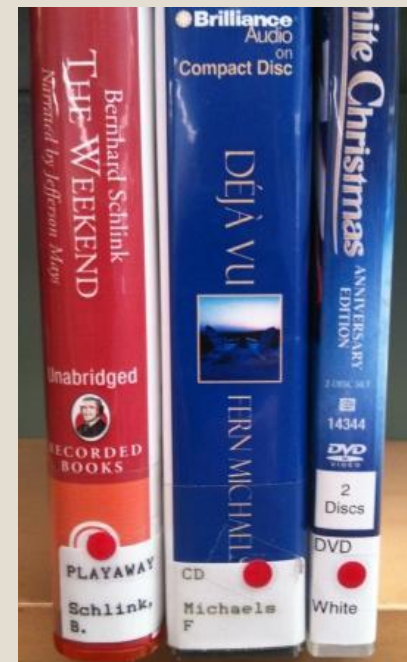


9. Philosophy

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!

Crew Method

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



Create List Recipe

RECIPE:

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 then 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



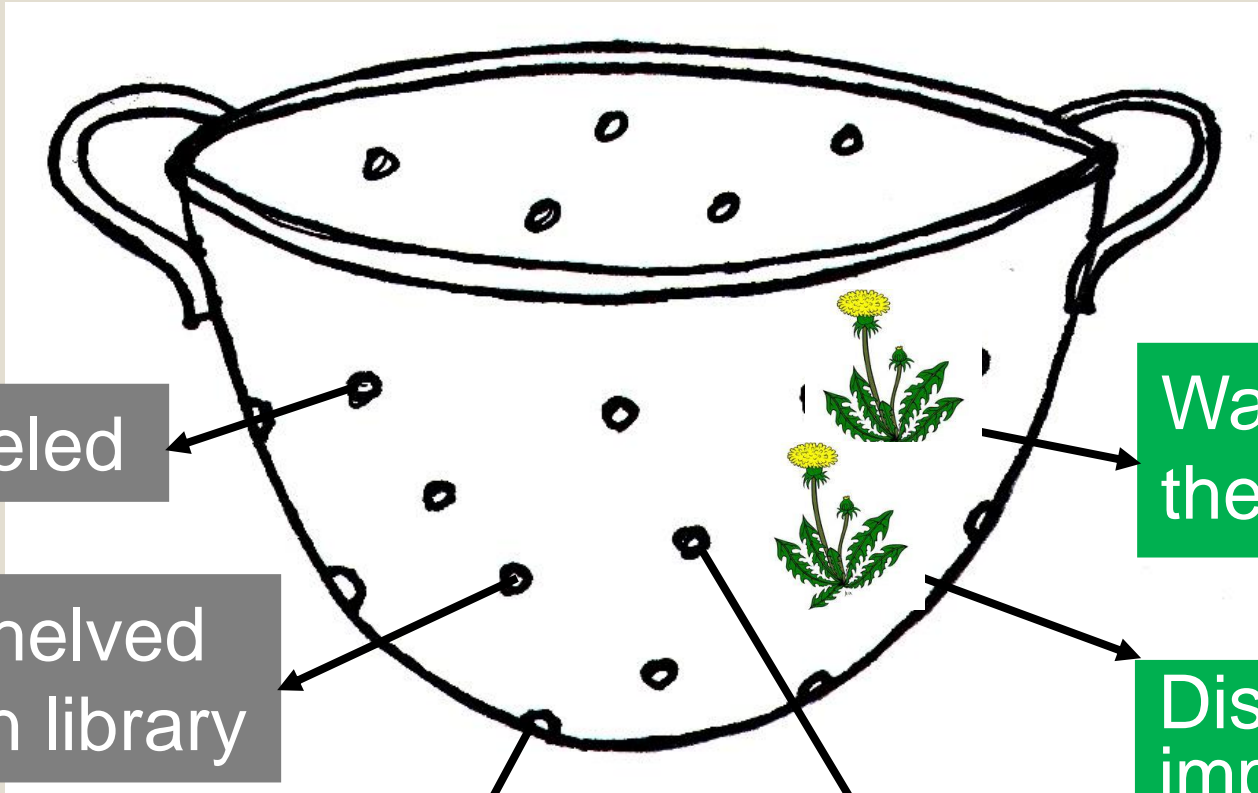
Strategy #2 Weeding by condition

- 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



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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

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

RECIPE:

Missing NO HOLDS

(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

RECIPE:

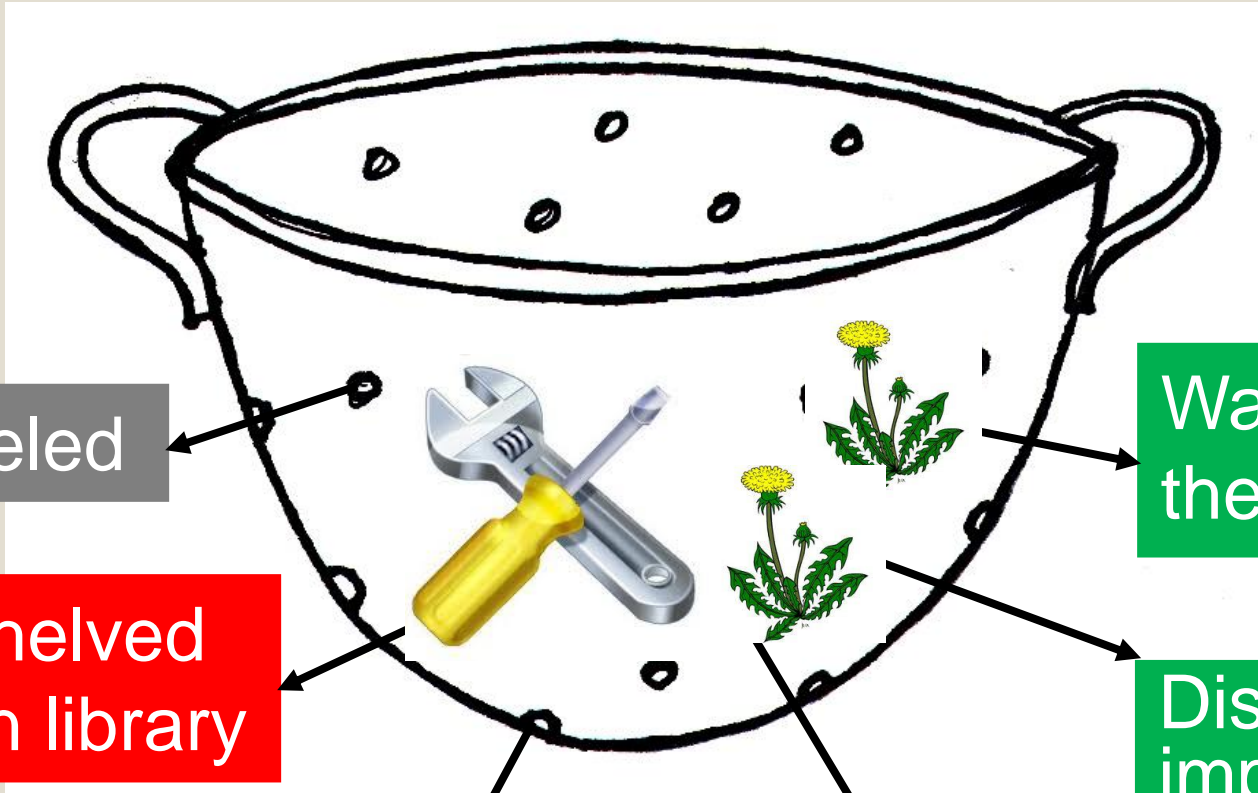
Claimed Returned

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

Sort by loc, call#, author, title

Export – barcode, loc, call#, title

Fewer cracks



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within library

Walk out
the door

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improperly

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Strategy #7 Barcode Scanning

Non-circulating and High Concern Areas:

- **What**

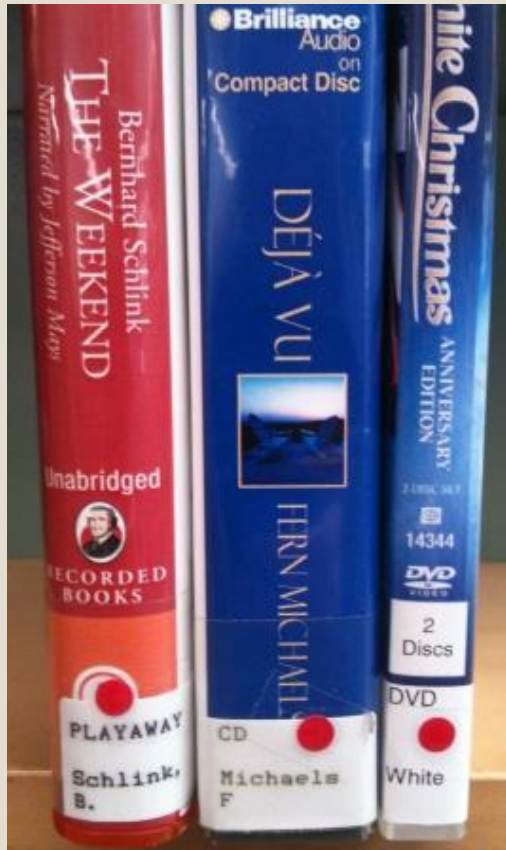
- Reference (Every 3 years)
- DVD's, CD's, etc. (every 6 months)
- Other? (As needed)

- **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**

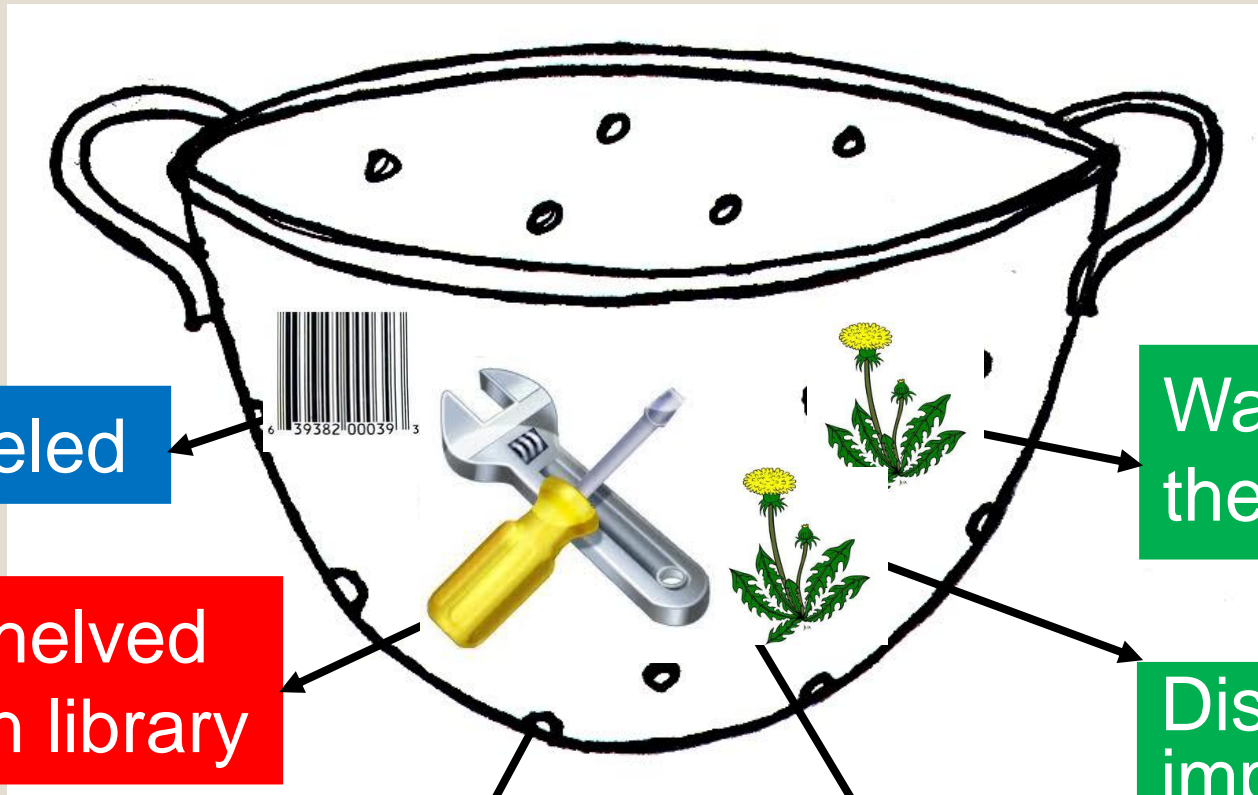
- Scan all on-shelf items
- What doesn't belong?

- **Frequency**

- Every 6 months
- Evaluate after 1 year



Fewest cracks



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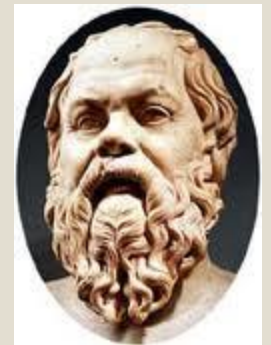
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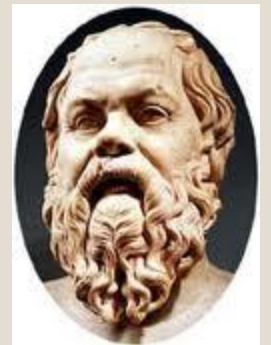
Strategy #9 Collaborate and Be Flexible

- **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



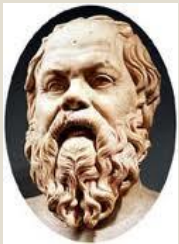
5. Missing, NO holds search report

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?

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