

Against the Grain

Volume 28 | Issue 1

Article 34

2016

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Recommended Citation

Alvin, Glenda (2018) "Collection Management Matters--Facing the Ugly Truth: Inventory," *Against the Grain*: Vol. 28: Iss. 1, Article 34.

DOI: <https://doi.org/10.7771/2380-176X.7292>

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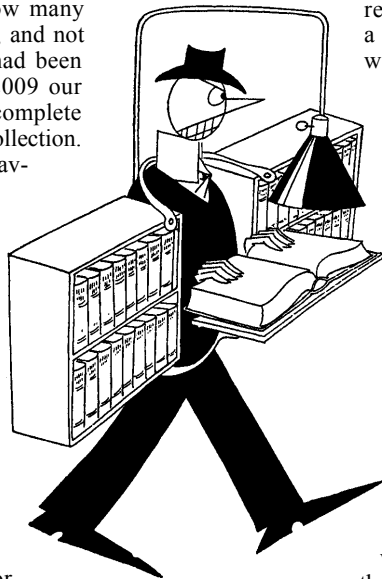
Collection Management Matters — Facing the Ugly Truth: Inventory

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Like our children, we prefer to think of our online catalogs as having only minor flaws. The inventory process may bring us face to face with an unwelcome reality check: the catalog is far, far, far from perfect. The road to as close as we can get to perfection is long, muddy, fraught with potholes and mostly uphill. Sooner or later we have to face reality, because inventory's Day of Reckoning cannot be avoided.

The Circulation Department usually manages the inventory process, and can handle books with wrong statuses or locations, but most of the problems end up in Collection Management. When older books are found that are not linked, decisions have to be made as to whether they should be kept or discarded. Worn and damaged books have to be evaluated for repair or replacement. Books with bibliographic records that are missing item records have to go back to the Cataloging Department. Records with wrong or faded labels have to be corrected.

Weary of guessing how many books we actually owned, and not trusting the figures that had been processed manually, in 2009 our Library Dean ordered a complete inventory of the library's collection. Nobody could remember having done an inventory since the library was automated and it had migrated through three ILS systems during that time. We ordered the inventory product for Millennium and since we did not have a Systems Librarian, the Head of Circulation was designated the Project Leader. She did not think it was necessary to shelf read the collection before initiating the process, nor



was there a weeding project conducted prior to starting the book inventory.

Aside from missing or miss-shelved books, wrong locations and statuses in the online catalog, there were a myriad of other problems. The worst of these were books with “dummy barcodes” that were not in the system and bibliographic records without attached records. There were also brief records that needed to be overlaid with full cataloging records. A little further down the list was dusty shelf sitters, many in multiple copies leftover from the 1980s and carried over when we converted the collection from Dewey to Library of Congress Classification. The situation was not helped by the frequent freezes and other software/equipment problems we encountered. It spewed volumes of error lists that had to be checked and re-checked.

Midway through the inventory, the university announced a buyout program and the Head of Circulation, a librarian who had held the position for many years, retired and was replaced by a paraprofessional who was willing to work to complete the inventory, but did not have any experience. The job of project leader then went to the Head of Cataloging, whose attitude was that since the inventory mode was in the Circulation module, it was their responsibility. The inventory limped to a frustrating end and the best thing we could say about it was that it was done.

I suspected that the inventory had been woefully inadequate and this was born out in 2013 when we decided to give it another try with newer inventory

software (Circa) and an upgraded system (Sierra). Unlike the first time, we sought the advice of others who had done inventory with the same equipment and the same ILS system. Our preparation was better, because we had meetings to decide what would be done, and how, and each department was clear on their responsibilities. We also made sure we had the laptops and other equipment necessary. Instead of using library staff, we used students assigned to the Circulation area who proved to be remarkably committed to the project and kept it moving at a steady pace. This time the Circulation Supervisor was ready with lessons learned and by then we had hired a Systems/Metadata librarian who took charge of the implementation and procedures.

As soon as the inventory got underway, the Circulation staff started bringing down cart after cart of books that had not been linked. Some were old, but others were the products of indifferent and incomplete cataloging. Each of these carts needed to be sorted for replacing, repairing or discarding. The problems of the previous inventory visited us again, because there were still bibliographic records without item records. However, with the cooperation of the library's wife, the inventory software provided more useful reports and the process was less frustrating than the first time.

We finished the inventory in a year and we thought the Main Campus holdings were in pretty good shape.....then while I was weeding, I came across a book that did not have any bib record. No matter how careful you think you are being, there are always books that get overlooked in an inventory. We are currently inventorying the collection at our downtown campus, which merged two collections and has never done an inventory. They have a huge number of books that have not been linked and the poor Circulation Librarian has stacks of them four feet high in his office.

Aside from providing a realistic assessment of the library holdings, there are several benefits for collection management when inventory is conducted on a regular basis. It provides a process for weeding and updating the collection. Each time an inventory is conducted the problems are identified and addressed, which enables the integrity of the online catalog to be strengthened. This makes it a more effective resource for our users, who should not go up three floors looking for a book that has been withdrawn from the collection or has been missing for years, without notice. Now that we have a successful process in place, I am lobbying for more features for our inventory equipment, so that we can do a better job of correcting errors from the past.

Let's Get Technical from page 61

how critical it is to involve the staff members who are involved in the day-to-day work in decision making processes. They are the ones who see the different issues that crop up and their input is necessary to know the scope of issues that need tracking and resolution. Additionally, given the scope of this project,

staff have often been unsure of how to proceed when making decisions about correcting obvious problems or deciding which editions to purchase as replacements, and involving them in the process both makes the ultimate work smoother but also makes them feel more empowered to make decisions and corrections that they have sometimes been reluctant to make. 🍷