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The Time Has Come . . . to Move Many Things: Inventorying and Preparing a Collection for Offsite Storage

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Abstract

In the spring of 2019, the Montana State University (MSU) Library embarked on a large-scale inventory project that involved weeding and moving portions of their collection to an offsite storage facility within six months in order to create more student study space in the library. The department primarily responsible for leading the project, Collections Access & Technical Services, the result of two departments merging, was also simultaneously navigating their new structure and a remodel of their workspace, thus adding further challenges to the project. This poster session demonstrated how MSU Library approached and completed this project by advocating to their Library Administration for additional resources, including hiring a project manager and third-party companies to assist with the inventory and moving of the collection. It also discussed the types of work groups formed to identify new workflows (i.e., retrieval of offsite items) and modify existing ones, involving student employees in the project, and internal and external collaborations that took place. Additionally, presenters shared strategies used to communicate to their campus community, and the impact this project has had on our patrons. They also included statistics that were gathered during the project including deselection figures, the number of materials that did not have barcodes and were not accounted for in the library's catalog and discovery layer (Ex Libris's Alma and Primo), and what subject areas currently remain in the main library building.

Introduction

The main impetus for this project was the need for more student study space in the library. Built "in 1949 and expanded in 1961, when enrollment at Montana State University was just over 4,300 students" Montana State University. (2019). The library has had no further additions or major modifications to its footprint in 60 years, even though, in 2019, there are nearly 17,000 students. Additionally, the Montana State University (MSU) Library completed a Master Plan in 2016, which includes modernizing and renovating the library over many years in various phases. Moving a majority of the library's physical materials to an offsite facility aligns with the Master Plan. Furthermore, the MSU Library had never completed an entire inventory of its physical materials; many items did not have barcodes, and they were not discoverable in the library's catalog. The members of the Collections Access & Technical Services department, the team primarily responsible for leading the project, understood the immense amount of work moving and inventorying the physical collection would be. They invited their associate dean and dean of the library to a department meeting in May 2018 to present a possible project plan, and to highlight what resources were needed

to complete the project successfully and within a reasonable timeframe.

Project Overview

Spring 2018

The Collections Access & Technical Services (CATS) department prepared a brief presentation to share with the associate dean and the dean of the library. The goals for that meeting were to introduce the scope of a weeding, offsite storage, and space renovation project (this was initially how this team had summarized what this project might entail); they highlighted specific roles and duties the CATS department might be responsible for; they also discussed the need for a project manager; and ultimately, they intended to share recommendations that might help Library Administration to move this project forward. The CATS team aligned this project with key points from the library's Strategic Plan, and connected it to the departments in the library that would most likely be primary stakeholders in addition to CATS employees. CATS also brought several "up in the air" concerns to their associate dean and dean such as a lack of subject librarians to determine what should move and what should remain. Additionally, CATS

shared existing duties and projects they were already responsible for to highlight how a project of this scale would affect their work. Through this presentation, CATS staff successfully made a case for hiring a project manager and bringing in a third party to assist with moving and inventorying the collection.

Summer 2018

In the summer of 2018, MSU Library Administration announced that due to the need for more student spaces across campus, the library would move forward with moving enough physical materials from the main library building to empty their entire second floor and half of their fourth floor. MSU Facilities Services had identified a space about a mile away from the library where materials could be stored (Figure 1). As the project moved forward, the library formed a Communications Strategies Working Group. The group included members of Library Administration and staff from various library departments who coordinated several meetings with MSU Facilities Services staff to view the floor plans. This working group was also tasked with learning about the current use of the offsite space and how it would be remodeled to meet the library's needs; they identified where compact shelving would be located

in the new space; and they identified an office area and a work space where library staff members could sort materials. Facilities Services took the lead on selecting and ordering the compact shelving for the offsite location. While the group from the library gave their input, such as suggesting new shelving over used (proposed at one point), Facilities Services were responsible for selecting and ordering the compact shelving for the offsite location. Both library staff and Facilities Services staff made several visits to the offsite location.

Fall 2018 and Winter 2019

As fall progressed into winter, the library began the process of hiring an outside company that would perform an inventory of the physical collection, assist with the weeding of the collection, and assist with moving the selected portions of the collection to the offsite facility. A Request for Information (RFI) was sent out mid-fall and a Request for Proposals (RFP) was sent out at the beginning of December. In January, a group of library employees reviewed the proposals that were received. From that process, two companies were selected: Backstage Library Works and Overton & Associates. Concurrently, the Collections Access & Technical Services (CATS) department



Figure 1. The future Library Annex undergoing renovations. Photo credit: Rachele McLain.

got approval to hire a temporary project manager who would oversee the inventory process and the move of items to the offsite location. A search committee moved forward with creating a job description for the project manager position. After the campus's Human Resources department approved the position, the library conducted interviews and offered the position to Janice Stokes, PMP; she began her appointment at the library in mid-January.

Stokes immediately began developing a project plan and created several project teams, each with different focuses and roles that would move the project forward. The project teams included the Library Spaces Core Project Team (made up of library staff and Backstage Library Works employees); a Collections team who would identify which collections would stay in the main library building and which subject collections would move to offsite storage; the Off Site Building Team (later renamed the Library Annex Team) who would identify new workflows and equipment needed at the offsite facility; and the entire CATS department, who focused on the physical removal of material from the collections and assisting with linking items without barcodes to the library's catalog.

Spring 2019

Starting on March 11, 2019 through May 31, 2019, Backstage Library Works (BSLW) worked on inventorying the library's monograph collections. In addition, BSLW employees linked items together in the library's unified library management system (Alma) and placed barcodes on materials that previously did not have a barcode. Coinciding with the linking project, BSLW employees also pulled previously identified items for potential deselection; however, this process outlasted the linking and continued through the end of July. Library staff identified over 50,000 items published before 2005 and that had not circulated in the last 10 years as materials to remove from the collection. BSLW employees pulled these items from the circulating stacks and placed them in an area where librarians would review the materials and decide whether to keep or discard an item.

With this process in place, the Collections Team made the decision to move the majority of the library's serials to the offsite storage facility (Figure 2)—monographs would remain in the main library on the third floor and in the basement, where existing compact



Figure 2. Boxes of serials filled the third floor of the library as they waited to move. Photo credit: Hannah McKelvey.

shelving was already in place. On July 1, 2019, Overton & Associates, the contracted moving company, began to move the serials to the offsite storage facility. As serial items moved out of the building, Overton & Associates also shifted the monographs that were going to remain in the main building. This process ended just in time on August 23, 2019—fall classes started the following week.

Summer/Fall 2019

The library's Communications Strategies Working Group created a robust approach to share the details of the project. Although the group had done some communicating about the project in the spring, the majority of their work was done in the summer and into early fall. They developed several different outlets to communicate the project to stakeholders. A Library Spaces website was created along with a logo for the project. Physical and digital signage was located throughout the library—print signage included a QR code directing users to the Library Spaces website. The project manager and the library's administrative communications manager updated this website weekly. Social media and the campus events website were updated throughout the project. The project was discussed at meetings

around campus including Dean's Council, the Leadership Council, and at the student government meetings. In addition, the library dean held several meetings throughout the spring and summer, inviting all faculty, staff, and students to come and learn about the project. An FAQ section was added to the project website; a survey was created to solicit feedback from students and faculty and shared in early February 2019. An e-mail that included project plans and where to get further information throughout the project timeline was sent out to all faculty and students. During the summer, although the student and faculty populations were down, large signage and posters, including a noise meter, were visible throughout the library. Digital banners ran across the library's Web homepage and across the library's discovery layer interface. To continue effectively communicating with users, the offsite storage facility also needed a new name—library staff settled on Library Annex.

Project Statistics

Prior to the start of this project, MSU Library had 502,107 items in Alma with an estimated 250,000 unlinked items and about 25,000 items flagged for weeding.



Figure 3. Students utilizing the new furniture on the second floor. Photo credit: Rachelle McLain.

Known Items in Alma BEFORE the Inventory	
356,818 Books	145,092 Serials
Total Items 502,107	

Backstage Library Works inventoried 207,190 items, linked 110,806 items, and reshelfed 103,648 items. They were unable to inventory and link all items during the span of their contract, so library staff are now working on completing this task with an estimated 140,000 items remaining unlinked.

Known Items in Alma AFTER the Inventory	
343,315 Books	229,608 Serials
Total Items 573,122	

Conclusion

Despite the immense amount of work that has already gone into this project—over 20,000 monographs weeded, thousands of serials moved to offsite storage, and thousands more monographs relocated to different locations in the library—there is still work to be done. The project manager continues to assist with the creation of new workflows and modifications of existing ones. One workflow that is still being refined is transiting items between the library and the offsite storage facility, and another is providing staffing at the new location. Continuing to link serials and complete the inventory of the collection continues to be a priority for library staff. The serials coordinator, who resides on the CATS department and oversees the management of the print serials, now splits her days at the Library Annex and the main library. Currently, the work she has taken on with the addition of the annex includes retrieval

of items requested by patrons, cleanup of materials not in call number order, and general maintenance of the collection. This arrangement is temporary and will be monitored through the rest of the fiscal year to determine whether it is sustainable. Perhaps additional personnel will be needed or current staffing will be adjusted. Interlibrary loan personnel also split their time between the annex and the main library, retrieving and scanning items requested.

MSU Library has received mixed reactions from students and faculty about this project. An opinion piece with a pro and con viewpoint was written by two students and published in the Exponent, the student-run newspaper. Despite the campus and the library's varied communication strategies, faculty and students returning from their summer break were mystified by the disappearance of the books. While monographs and serials did "disappear" from the second and fourth floors of the library, the majority of monographs were not gone and had only moved to different locations within the library; the serials are housed only a mile away. While the second floor received new painting and carpet, some new electrical, and new furniture, including new tables and chairs of varying sizes and heights (Figure 3), several students have shared that they miss seeing and being surrounded by books on the second floor. Some library staff have also expressed concern at the lack of intellectual content on the second floor and have proposed creating pocket or pop-up collections of physical materials. In the end, the fourth floor was not cleared of physical material. Older issues of newspapers, juvenile books, and oversized books were relocated to the fourth floor. As for the future, collections will likely continue to shift around as space considerations change and new needs from our patrons present themselves.

Reference

Montana State University. (2019). *Library spaces project*. Retrieved from https://www.lib.montana.edu/library_spaces_project/