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Inventory or Stockcheck?

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Inventory or Stockcheck?

Does the prospect of counting every item that circulates in your collection scare you? Are you putting this exercise in control off to another day when you might have more time? Most libraries need to complete an inventory project; however, due to a lack in both staff and financial resources, an inventory of the collection is often avoided. Furthermore, if an inventory project is planned, when should it be undertaken? A recommendation suggests an inventory every year. For many public schools, the summer months are often reserved for completing an inventory of the library's collection. However, for institutions with classes continuing throughout the year, there is not time in the summer for such a project. Some try to complete an inventory during a holiday break. This seldom works because many times library staff is off duty during the scheduled holiday break.

Why should the library complete a massive counting of its resources? First and foremost, to make sure that what is on the shelf actually matches the catalog record. Secondly, to justify expenditures made to build the collection.

To whom should this enormous task be assigned? In our library, the Collection Services Librarian was responsible for completing an inventory of the main campus collection. The project was to begin in the spring of 2004. Since no monies or additional staff was available for this particular venture, the project would require completion with available personnel and equipment. The primary players in our inventory project included both the Collection Services Librarian and the Technical Services Librarian. Because of the training received in Collection Development, it is better that a Master's-Level Librarian oversee the inventory project.

Although computer technology has revolutionized the work done in today's library, the old-fashioned "hands-on" form of library book inventory remains alive and well. Our library circulation and processing module utilizes Millennium software with

Innovative Interfaces, Inc. This system enables us to produce lists with specific criteria. Unfortunately, we didn't have the inventory module that is available for our automated system. Our lists, or Review Files as we chose to call them, included a listing of 100 bibliographic records. Each list, review file, or printout was a listing of items as they appeared on the shelf. Each record included the item's call number, title, author/editor, physical description, and location code. Using our review files, we were able to compare the actual item with its corresponding computer record.

During the course of the inventory, when assigned a review file, an individual went to the shelf and pulled the books or materials, which were shelved according to the Library of Congress classification system, which matched the information on their review file. With the library resources in hand, comparison could be made with the review file printout. Accuracy between the two was the ultimate goal. We found that a review file or printout containing only one hundred records was both manageable and efficient. Depending on the size of one's book cart and or the size of the items to be counted, the number often fluctuated. Many times, it was necessary to make several trips to the stacks to acquire the items listed. Whenever a title or item didn't appear to match the corresponding call number, the title was highlighted indicating that the item had not been counted and was missing. After the list in hand was completely checked, and effort was made to locate the items highlighted as missing. The procedure for this was to first check the online catalog to determine if the item had been checked out. If it was indeed checked out, then the due date was recorded adjacent to the title on the review file for later reference. If the item wasn't checked out, then it is supposed to be in its respective place, right?

If an item matched its corresponding record completely, the depending upon its format, it was counted. For books, we chose to count a single item as one volume and one title. If

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ABSTRACT

You have been assigned to physically count every learning resource item currently shelved in your collection. How would you respond to this seemingly impossible and intimidating task? Without a doubt, you might be overwhelmed as I was. Upon receiving my marching orders to begin counting our main campus collection, I looked around and just stared at row upon row, and shelf upon shelf, cabinet upon cabinet filled with books, video cassette tapes, audio cassette tapes, and books; oh the books. Not to forget slides, microfilm, compact discs, etc. So, where do you begin? For me, I chose to begin counting the section closest to my desk. Rather than let this daunting task discourage me, I just started counting and improvised as the need arose. I knew that I could count everything; I just had to put together a workable plan. The article that follows is a brief description of our library inventory project. All who participated became better acquainted with our main campus collection. My job description requires that I engage in counting our growing collection once every five years. Right now, I'm not counting the days until the next five years begins.

it were a multivolume set, we counted it as one title and the volume count was composed of the number of volumes within the set. As many libraries do, we have materials in a variety of formats. We counted them as one title and either one CD, video cassette, audio cassette, DVD, slide, map, etc. Of course we needed something on which to document our figures, so we created an Inventory Tabulation Form. This form contained the following categories: volumes, titles, duplicates, textbooks, missing items, discarded items, items with no bibliographic record, damaged items, videos, cassette tapes, compact discs, slides, DVDs, etc. Obviously, we had to make heavy use of abbreviations on our inventory tabulation form.

Since we based each review file on a letter which represented the Library Classification scheme, each review file had a letter and numbered title. For example, if an individual had a review file for General Works and it was the first printout in that classification scheme, A1 might be assigned as the title. If on the other hand, there was a review file covering titles listed in the Bible section, the review file might be titled BS1. This was the system utilized throughout the inventory project.

Throughout the process of counting the collection, we encountered problems. In the following portion of this discourse, I would like to address items which were mentioned earlier that may have been missing due to check out or not being shelved properly at the time we inventoried a particular area. Occasionally, the item in question did not match the corresponding record at all. At times, items may have had any number of problems such as having been assigned an incorrect spine label, bar code number, or pagination. Furthermore, items were found to have been assigned incorrect location codes. Indeed, incorrect location codes were found to be the most often occurring error. As in many libraries, the collection consists of circulating, special collections, reference, as well as reserve items. Whenever items were not located in designated places, all the other

possibilities within our building were checked. Many times, maybe more often than we care to admit, we would find a “missing” item miss-shelved in some other area of the collection. Often we jested that we weren’t working as librarians; but instead as detectives trying to solve the puzzle of the missing item!

As each physical item was compared with its corresponding record, the rare opportunity for cleaning up all the records was presented. Correcting the incorrect records involved the cooperation of the Technical Services Librarian. Typically, at a designated time each day, the Collection Services Librarian would take the problem materials to the Technical Services Librarian to revise and correct discrepancies which had been uncovered during the process. As mentioned previously, incorrect location codes were the most frequent discrepancy discovered. Sometimes incorrect pagination was a problem as well. After encountering numerous pagination inconsistencies, I settled on an unofficial rule of thumb so-to-speak. If the pagination and its corresponding record differed by less than five pages, I chose not to take valuable time in correcting these seemingly minor errors. Most revisions involved correcting a location code, adding or deleting an author/editor’s name, or adding the complete title to the subtitle. On occasion, duplicate volumes existing on separate records were discovered when, in actuality, said volumes should have been included in the same record.

Because of the location of other parts of the main collection, we weren’t able to inventory a number of materials. For example, one particular set of materials within special collections is located in another building away from the main collection, making it difficult to move to other buildings to continue inventory. In addition, all library-related materials, regardless of location, were processed in the central building of the library. Faulkner University has extended resource rooms located in several locations throughout Alabama, making the task of including these items in the inventory extremely difficult. However, when a problem

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with a record or item was discovered and it was assigned to one of the extended resource rooms, effort was made to retrieve the item to the main collection so that any inconsistencies might be corrected.

Ideally before attempting to count any section of library materials, it is prudent to shelf-read those items. However, upon assignment of the task of inventorying this collection, we simply proceeded to create a quick and simple method for counting our materials giving us little time to research and formulate a formal inventory plan. In short, we busied ourselves counting and implemented and improvised as we saw the need to do so.

This inventory project required complete cooperation and communication for all involved. Because of our small size, it was usually known who was counting in what area. When the need to check and verify arose, there was no problem encountering the correct person.

Conducting a complete inventory of our collection resulted in several advantages. As already mentioned, it provides a good opportunity to correct the catalog's records. It helps to identify areas that need weeding or replenishing. It helps to be reminded of the various titles present in the collection. In our collection, I discovered as I was counting the materials in the area of personal finance, I learned that we were missing too many titles from this part of our collection and I can only attribute that to the possibility of theft. Looking at each item individually helped us identify damaged materials. I also discovered duplicate copies in areas where we did not need duplicates. I discovered a number of items that had no bibliographic record. Furthermore, I uncovered items that had no bar code number assigned to them. Upon occasion, I found similar titles with the wrong record attached to them. This often occurred when new editions of an item had been published and somehow the record simply got swapped.

Since books tend to come in a variety of sizes, it is not uncommon for an item to be missed because it has fallen over, fallen behind, or even been lost between other books. On occasion, I would even find a book lying on its side atop the tallest shelf and behind the row of shelved books. How many of us think to get a step ladder and look on the very top shelf for books lying on their side and out of sight?!

Our inventory project greatly improved our ability to locate materials that are represented in our catalog. We discovered areas that need to be weeded, as well as areas which needed to be improved and expanded. Quite a number of damaged materials were identified and sent out for repair. We also identified some books which needed to be placed in other areas of our collection and some which were sent to our satellite resource rooms.

Upon completion in November of 2008, we discovered that we were missing a number of volumes. At this point, we went back through each review file paying special attention to the items that were highlighted as missing and having evidence as not having been counted. With the passage of time, many items that had been checked out or were out of place for whatever reason had returned to their respective place on the shelf and we were able to count those items. We still had volumes missing when we had gone through our review files for a second time. Unfortunately, some materials were on permanent check to faculty and we had no way of knowing when these items would migrate back into the collection. Although we have completed this massive project, we are still counting those materials that were checked out and are slowly being returned to their specified place in our collection. †

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