MOVING TO STORAGE:
BALANCING TECHNICAL AND PUBLIC SERVICES NEEDS

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ABSTRACT: The focus is on the decision making process involved in determining which materials should be moved for maximum benefit of space and use and minimum cost in time and effort in retrieval, what records need to be maintained for control of the collection and ease of retrieval, and how materials can be organized for ease in moving and retrieving. A moving project should meet technical services needs for control of collections and ease in processing and recordkeeping and meet public services needs for ease of retrievability and availability for use of the moved materials.

BACKGROUND

The author has been involved in two moves of a library collection of 40,000 and 65,000 volumes, two storage moves of approximately 10,000 volumes each and is currently working on a partial consolidation of collections with concurrent removal to storage involving about 5000 volumes. The next major storage move is expected in 1995.

I would like to focus on the hardest part of the move: planning. The physical move is generally both better and worse than expected. In order to make the physical move the smoothest part of the procedure, there are a number of preliminary questions to answer in planning a storage move. Most of these questions would also be applicable to a move of an entire library collection.

INTRODUCTION

When reporters are writing an article they use key questions to insure that they cover the pertinent facts: who, what, why, where, when, and how. In order to plan for a move to storage, the librarian should use the same questions, but not in the order listed above. I list the order I feel is the best for planning, but each question will not be completely answered before considering the next one. You generally would be working on multiple questions at once.

1. Why? Why are you considering storage as an option? Stayner and Richardson (1983) list four options to the space problem: new primary space attached to present space, secondary space used for storage and controlled by a single institution, shared storage space for more than one institution, and no new space. Often new
primary space is too expensive. Storage space, single or shared, is less expensive than new primary space. Each library must consider what is their best alternative. Do you discard materials to provide sufficient space or give materials to another library? If you can use this option, you might try to identify one that is nearby so you and your library users can still access materials fairly easily. Are there safety reasons for the move to storage, or is the problem simply overcrowding?

2. Who? Who will be making decisions? Who are the participants in the decision-making process? Does this include administration outside the library? The Librarian? A group of librarians? Another department? An advisory or executive board? Who must give permission, approval, and provide funding? Different people may be included in different areas of decision-making, as decisions include selecting, approving, and obtaining a location; determining the amount and type of items to be moved; selecting exactly which items to move, remain in primary space, or be withdrawn from the collection; and selecting the method for the physical move. Someone among the decision makers may need to provide a proposal explaining why a move is needed in order to obtain support, space, and funding (Clarke, 1991; Kennedy & Stockton, 1991).

3. What? This is a two-fold question which means both what materials need to move to storage and what is the volume count you can and should move. (Bellanti, 1991; Clark, 1991; Cooper, 1989; Cooper, 1991; Lee, 1993; Stayner, 1983) In my experience serials are the most space consuming type of materials in a science collection and the easiest to evaluate and identify as candidates to move. This makes them easiest to work with if a storage move must be done quickly. Monographs are somewhat more difficult in arrangement, but there are methods to take advantage of their more varied size. How much space you have and how much you need may not match. Some general criteria to assist in determining materials include selecting titles which have ceased or are no longer currently being received, selecting materials published before a certain date or covering a subject area not of current interest, using a section of the alphabet or subject arrangement to relieve a specific overcrowding problem. (Sample form at end of paper)

4. Where? Where is the storage space? The “Who” decided where the space would be, but where is it in relationship to the main library space? Is it attached? Is it in the same building? If it is in the same building, is it on the same floor or on another floor? Is it in another building? Is it within walking distance or do you have to drive to reach it? How long will it take to travel between the main library space and the storage space? The answers to these questions will effect the amount of time to accomplish the move to storage, the method of moving, the staffing for the move, the cost of the move, and the amount and cost of retrieval after the move to storage is done.

5. When? Is there a timetable for the completion of the move to storage? Is the timetable for a one time or a continuous move? A one time move means that all materials will be moved and storage space will be filled at one time. A continuous move allows for materials to be added to storage over time. If it is a one time move, you may
need assistance to complete the move quickly. If the move is a gradual shift of materials spread over a longer time, it may be possible for it to be done by regular staff. Do you need to move soon? Can you begin the move next week, or can it wait until next year? When is your start date, and when must the move be completed?

6. How? How will the move to storage be completed? (Kelsey, 1991) This is essentially the physical part of the move and includes many decisions which will have been made during consideration of the earlier questions. Some problems which you must be alert to avert include the discovery that not as much as hoped will be able to be moved, or the opposite, which is that more will be able to be moved. You need to be prepared for either possibility. This problem occurs as early measurements may prove to be in error once the move starts. Non-standard shelving can be a problem. Be sure before you start that all shelving is installed and anchored properly and that weight will be distributed correctly. Be sure that shelves on adjustable shelving units are correctly measured, placed, and secure. Before anything can be moved the configuration of the storage space should be determined. Consider what is the most logical and space efficient order of the shelves. Are materials going to be arranged alphabetically, by size, in acquisition order as received in storage, by call number? How do you wish to label the shelves, by section, by individual shelf, or by range? Can you do the move with available library staff? If you can, fine, but if you cannot, what assistance is available? Do you use volunteers? Volunteers are easier to recruit if an entire collection is moving than just a move to storage. Is the administration supportive enough to provide staff borrowed from other areas, or assistance hired just for the move, or is time flexible enough to do the move with regular staff? Do you have to box materials for the move, can they be moved on carts, can they sit directly on the shelves? Either moving in boxes or carts, how do you keep materials in order during the move to make placement in storage faster? How will you keep track of which materials are moved so retrieval can be efficient? (Bellanti, 1991)

Based on these six questions I will briefly summarize three storage moves. I will identify which questions applied to different steps in the moves and add comments as to good and bad features of each storage move.

There were common factors:
1. No items had to be boxed.
2. No booktrucks in addition to the ones already owned by the library were available to assist in moving.
3. Space for each move was pre-designated. In two cases the number and configuration of shelves was known before the space was given to the library. In the third case only the size of the room was known beforehand.
4. The library was in charge of the physical move and all selection and recordkeeping.
5. Primarily serial titles were moved. For the first two moves only serials were considered. For the third both monographic and serial materials are being moved.
6. In each case almost all records were manual. Only in the current case are computer records available for some materials.
7. Only one move to storage included assistance from non-library employees.

MOVE 1

Why? The decision in favor of storage was made because a project within the building adjacent to the library space required part of the collection to move to allow construction. The collection was unique for its geographic area so withdrawal of materials was not appropriate.

Who? Administration above the library made the decision that storage was the answer to the space problem, notified us as to the time frame for the move, and allocated the storage space. Based on the amount of storage space allocated, the Head of Technical Services (HTS) determined how many volumes could be moved into the designated space (@10,000). Public Services was notified, but not consulted.

What? The HTS decided that both ceased titles and all current titles older than ten years in journals beginning with letters A-D would be stored. Public Services usually should be included in the determination of which materials should be moved.

Where? Storage was unattached to present space but within walking distance. The storage area was about half a block away up a slight rise across two parking lots.

When? We were told we had two weeks (ten working days) in the winter to do the physical move itself including installation of the shelving. Installation took a day and a half of the time scheduled.

How? There was a truck and driver available for a total of one trip per day for four of the days in order to move fully loaded carts. Volumes were loaded onto all available book carts and lined up in order at the elevator. They were taken to the first floor and loaded in reverse order up a ramp onto the truck. The truck drove and the unloaders walked across the icy surface to meet the truck. The full carts were offloaded from the truck, now in alphabetical order and unloaded directly onto the shelves. The carts could not be rolled into the storage space, but had to be unloaded at the door of the building with the door left open. The truck left and staff rolled the empty carts down the hill to return them to the main building and back up to the library to be refilled. All staff participated in the physical move in one to two hour shifts on any one day, moving about a dozen carts per truckload.

Comments: The truck used was not designed for moving carts such as we were using. The ramps for the truck were too steep for the larger carts to be pushed up so they could not be loaded double sided. It snowed part of the time and the ground was icy. The empty carts were dangerous on the ice and tended either to fall over or to run away, so someone
had to walk on the downhill side. After the move Public Services staff were even more sure that the time constraint had not been to our advantage as we wished we had been given time to select only ceased titles for storage and be able to shift the entire collection to relieve pressure in all areas of the alphabet. Paging of currently received titles was more frequent than for ceased titles. For two titles retrieval was so constant that an additional ten years was brought back. Location information was entered directly into the kardex from a list compiled during pulling. Marking involved only a few trays, so only a small section was unavailable for use while this information was entered. On the plus side it was easy to remember what had been moved. It was easy to retrieve because the volumes were all in order with no spaces. It was easy to reshelve because the empty space was obvious.

The original plan by the HTS was to retrieve and reshelve twice a day, but many users resented having to wait for items in storage, so “emergency” requests were accepted and retrieved if staffing permitted. When retrieving an emergency request materials were not taken for reshelving, so that usually meant that reshelving got behind. A special heavy duty dolly was purchased for transporting materials to and from storage as normal book cars are not built for outdoor use. The walk to storage was generally considered too hot in the summer, too cold in the winter, too wet in the spring, and too windy in the fall, so some staff would avoid the duty if at all possible. The storage space was not well regulated and tended to be hotter than the library in the summer and colder in the winter which was not an appropriate preservation location.

MOVE 2

Why? About 10,000 volumes needed to be moved in order to relieve crowding in the journal stacks. One level of the main stacks had numerous ranges with volumes shelved on the top of the range. Top of range shelving is considered a hazard for retrieval by both user and staff and users were occasionally caught climbing the stacks resulting in bent shelves which do not provide proper support for the books; however, no user or staff member was ever hurt while retrieving materials.

Who? The space had been promised to the Library in the future, but the present occupant had freed up about two-thirds of the space. We were invited to share. We accepted and needed no further approvals to proceed.

What? Librarians began with identifying materials in the M-Z journal stack area. Based on current holdings and research interests certain subjects were identified as prime candidates (entomology and ornithology), ceased titles in other sciences, and older volumes of four titles due to length of run and space considerations (*Science* and *Nature* pre-1970, and *USGS Bulletin* and *Professional Papers* numbered 1000 or less).
Where? The storage space is in the building and has deep specimen collection shelving with swing bars on the fronts of the shelves to keep materials from falling. The space is on a level with other library space, but not with other library stack space and is not attached to other Library space.

When? We wished to complete the bulk of the move during the summer when fewer classes are in session. There is no air-conditioning in the library or in the new storage area, so most of the moving needed to be done during the morning.

How? A review of the titles was already in progress, so identification of titles for storage was easy to do. The review included holdings, currency, availability elsewhere on campus or in the area, and information on usage. The shelving in storage was numbered and labeled with each section starting with the top shelf as a new ten, i.e. 001, 011, 021 etc. This made it easy to locate a particular shelf as we could already know whether to look high or low. Forms for titles for storage were pulled from their notebook; volumes were pulled and loaded on carts, 1-2 carts at a time; the carts were moved in the elevators to storage and offloaded onto the shelves in order as arranged on the cart. To use the space to its maximum shelves were double loaded unless the volumes were too large. The shelf location was marked on the form and both the number of titles and the number of volumes were recorded for statistical purposes. When the empty carts were brought back upstairs a manual check-out slip was made for each title and filed in the circulation file, a red “S” was marked on the title card in the kardex, and the form was refilled in the notebooks in alphabetical order. While the records were being marked a new pair of carts could be loaded. Generally, two or three trips per day was all that could be managed. Rarely, one person would do moving alone, but we usually tried to have two because of the weight of the carts.

Comments: The materials were moved in order as they were pulled from the shelves. Although titles are not shelved alphabetically, no title is split into two storage locations. Titles with short runs are placed with longer runs wherever they fit to use all the available space. This has the advantage of being able to move materials in any order. Because it is former specimen collection shelving, items are double shelved and require moving the front row to reach items in the back row. The front bars keep the materials from shifting on the shelves which are full for better support. The library shares access to the space but no one retrieves or removes library materials except library personnel.

Currently, all serials are in the process of being cataloged for entry into the online catalog. As storage titles are entered, the shelf location is included. A shelf designation is required to locate an item. Multiple location of records allows for easy identification of storage location. This is especially useful as we can still locate materials when the online catalog is down. A change in procedures for processing returns requires location to be looked up and noted for any material thought to be storage. Storage items are retrieved on demand if staffing is available, but not longer than 24-hours. Reshelving in storage is batched for efficiency. One disadvantage is that shelf reading of this space is impossible without major changes in records. There is no file in shelf order for storage. Checkout slips made during an earlier move to storage space in the
basement did not give much information about the title, but slips for this move included date or volume ranges.

MOVE 3

Why? This move is to consolidate materials in specified subject areas from two libraries.

Who? Library administration generally requires title by title approval for moving items either between libraries or to storage, but for this project approval for decisions agreed to by heads of both libraries does not require an upper level signature.

What? Titles designated for storage are predominantly serials, ceased titles, and subjects not currently being taught. Items selected are predominantly serials, but monographs also are identified and can be moved.

Where? Storage is about a mile away from either library and across a freeway. The amount of space has been designated by the library administration for storage for science materials. All materials in storage are considered to belong to that facility, not to a subject collection.

When? This project began in January, 1993. There is no set end date.

How? The transfer to storage, or any other location, requires checking of two sets of kardex records, shelf lists, and closed card catalogs and the online catalog to identify duplicates and confirm holdings information. Once the decision is agreed to by the two Head Librarians, materials may be pulled from the stacks and sent to storage with the standard transfer form included. Titles which are owned by both libraries are consolidated in one location. Fill-ins to titles in Hancock storage are moved directly to that space and duplicates are withdrawn. This project is about 90% reviewed and 20% transferred to storage as of mid-September.

Comments: This is complex because two libraries are involved as well as a separate storage facility. Only in the online record do holdings of the libraries appear, but not all titles are in the online catalog. Those without online records must be entered by one of the librarians; any titles moved must have the record revised. Once this is done, moving is accomplished by boxing the materials and using campus delivery systems to send them to the storage facility. Personnel there unbox the materials and shelve them in call number order. Kardex(es) and shelf lists are marked appropriately, but card catalogs are considered closed and may not be changed. One library is pulling cards from its catalog.
CONCLUSIONS

First, there are no right or wrong answers. The methods discussed here briefly, or those in the bibliography, are there for suggestions. You can make the decision-making as easy or complex as you wish. Use the six questions as a guide to help you work out what will work for you.

Decide what is the purpose of the consideration of storage. Do you need to have easy retrieval by staff with little training required? What is the best arrangement for the space? By title? By call number? By size? By shelf space? (Kountz, 1987; Tanis & Ventuleth, 1987) Can you balance the need to make retrieval easy with a need to maximize space? What possibilities are there?

Are items boxed or on shelves? How are shelves arranged? Are they anchored before you start? Are boxes numbered or are shelves numbered?

What kind of records do you need and how are they arranged? By title? Cross-referenced? Online? Marked in kardex? In shelflist? In a circ file? In some special file?

Who has or needs access to location information? Users? Staff only? Where are the files located? Circulation? Serials? Dial access?

Is your storage space full or do you use the same rules as for open stacks? Open stacks are said to be full at 75-85%. Do you need to shift to add items to storage? Is additional space possible later? Is it attached or unattached? Is it in the building or elsewhere? Who has access to your storage space and is anything else stored there?

Can you adapt existing equipment for an automated storage area? This is higher cost, but retrieval can be fast and control is excellent.

RESULTS

Generally, there are three results of a successful move to storage: you have more primary stack space for growth, the library maintains control of the collection, and the record-keeping is accurate for retrieving materials quickly.
Bibliography


SERIAL EVALUATION FORM

1. Title:

2. Number of Issues Received/Year:

3. Issue last received:

4. Date received:

5. Problems (ie. claims, etc.):

6. Indicate the number of times used based on current circ. stats.:

7. Indicate other locations in California:

STOP. DO NOT WRITE BELOW THIS LINE. GIVE TO LIBRARIAN FOR COMPLETION.

TO BE COMPLETED BY LIBRARIAN

8. Content:
   Fisheries
   Aquaculture
   Marine
   Natural History
   Oceanography
   Systematics

9. Region covered:
   Pacific Rim
   Other

10. Language:

11. Decision:

CALL NUMBER UNIVERSITY OF SOUTHERN CALIFORNIA
LIBRARY USE SLIP

Books drawn on this slip should not be taken from the Library, or given to other readers, and must be returned to desk from which withdrawn. USC Library Card Must Be Presented With This Slip.

Author
Title

I have read and agree to comply with the above rules.
SIGNATURE