>> Santi Thompson: All right, folks. Just as a reminder, if you have questions on Helen's presentation, or if you want to hear it for the first time, feel free to go to the Exchange site for her page and leave discussion questions in the online forum or see the video when it's made available.

Next we have, in part, and Sheli here, so I'm going to turn it over to them and they can tell you all about gone but not forgotten: A remote storage success story.

>> Sheli Pratt-McHugh: Hi. This is Sheli McHugh. I'm the cataloging and metadata librarian and the learning commons coordinator here at the University of Scranton in Scranton, Pennsylvania.

>> Narda Tafuri: And this is Narda Tafuri. I'm coordinator of technical services here at the university.

>> Sheli Pratt-McHugh: The University of Scranton is a private masters level medium-sized university with an enrollment around 5,000 students, and we're located in northeastern Pennsylvania. Our library was built in 1992, with a capacity for about 20 years worth of growth, and just for some background information, our library uses innovative Sierra management system and we have Encore as our discovery layer.

>> Narda Tafuri: And here's our first poll.

>> Sheli Pratt-McHugh: Okay. So it looks like most of you are academic libraries.

>> Narda Tafuri: As we approached our 25th anniversary, our stacks were at maximum capacity. Our HVAC system has also had problems, which combined with the overcrowding, has created a recurring mold problem. We have a projected increase in volumes at about 5,000 per year. We also have had staff turnover that made it difficult to dedicate time to a proper weeding project.

Historically here, there have been departments on campus that were resistant to weeding as well.

>> Sheli Pratt-McHugh: So our second poll question: Has your library reached or will soon reach shelf capacity?

Yeah. So it looks like a lot of you are facing the same kind of problems that we were. So we began researching some different options to deal with this problem. First, we reached out to our facilities department to see if there were any storage options on campus, and there were some spaces available, but none that were suitable for storing paper or books. So we also discussed some nearby storage facilities, but nothing seemed to pan out that met all of our needs, which included security, climate control, a quick turn-around time with a delivery service, and that also required additional personnel or transportation that we just couldn't afford at the time.

Then our consortium, PALCI, reached out in the fall of 2015 to all the membership about a contract they were investigating with Iron Mountain. So several members are expressed a need for remote storage, and that's why PALCI started reaching out to us. They had reached an agreement with Iron Mountain for a consortium, but there would have had to have been a quick turn-around time, and each library would have had to send enough books to total 100,000 titles. And ultimately, that deal fell through. So then we pursued an agreement on our own with Iron Mountain.

>> Narda Tafuri: Here's your next poll. Are you considering a remote storage project in the near future?

>> Sheli Pratt-McHugh: It looks like some of you are, so that's pretty cool. And then we have another question. If yes, when were you planning on implementing this project?

So some of you are looking in the near future.

>> Narda Tafuri: Okay. Iron Mountain provides storage, records management and data backup and other services, so they seem to be an ideal fit for us. When we met with them, they honored the price that was negotiated through the PALCI consortium and they met all of our criteria, 24-hour turn-around, a low-cost, space-secure environment for our materials and they were a well-trusted company that has worked with other libraries. They have facilities all over, but our materials are stored about two hours away in upstate New York in Rosendale in an underground old cement mine that some of us were able to go and take a tour of.

>> Sheli Pratt-McHugh: So which remote storage options are you currently considering? So the majority of you are able to find some campus storage facilities. We weren't that lucky.

So while we were still considering PALCI, we shared this idea with our library advisory committee that is made up of faculty representatives from each department. The library advisory agreed that this was worth investigating, so we set up a subcommittee to create selection criteria, and an evaluation process.

We tried to include individuals on this subcommittee that were from departments that we felt would be most resistant to this kind of project. After discussion, the subcommittee agreed on the criteria, including anything that was published before 1950 and had not circulated since 2003. So 2003 was when we migrated to Triple I so we didn't have any circ data from before that. So this equalled about 3% of our collection that was then vetted and approved by the department.

So faculty could mark any item on the list, and we would remove it from the list so it would not be sent to remote storage. The faculty had ultimate control over what was and was not sent.

Just a note. When we explained to the faculty that this was 3% of our collection, rather than saying 10,000 titles, faculty felt more comfortable and could better, like, picture that amount of books, so it wasn't as overwhelming to them.

We also assured faculty that we were pulling titles from across the whole collection, and not just from one specific subject or department. So they found that reassuring as well.

>> Narda Tafuri: And here's our next poll. Do you have buy-in for your project from your constituents, faculty administration, library board.

>> Sheli Pratt-McHugh: It looks about split between yes and maybe, so that's pretty good.

>> Narda Tafuri: The next thing we needed to work on was our catalog, and we worked with our systems department to develop a new location code for off-site storage for both the bib and item records. We wanted the hold process to be the same as items located in our library. However, our catalog right now does not talk directly to Iron Mountain's inventory software, so it appears the same to our patrons but on the back end, we have to run a second holds report and manually E-mail Iron Mountain with a request, and we run that report every day. They're working on a way to make this automatic to save staff time so that the front end and back end processes are seamless.

The subcommittee that we formed also agreed that if an item is requested, that when it's returned to our circulating collection, it will not be sent back to storage.

>> Sheli Pratt-McHugh: So now we're going to talk a little bit about logistics. We wanted to start this project as soon as possible, last spring, so as soon as the spring semester ended, we wanted to hit the ground running. We located sort of a staging area using three group study rooms on our third floor. So two of the rooms would be used for staff processing, and the third room would be used for book storage. We had to put in work orders to have furniture removed from the room, and then we had to put in tickets with our IT staff to have two PCs placed in the room with Sierra and OCLC installed, as well as a bar code scanner installed. And in this picture you can see one of the work rooms with our PC and some of our carts. We made sure the rooms were secure, and that all of the team members had access to the keys for the room. We also measured the rooms to figure out the square footage and estimate how many book storage carts we could fit, and how many books the carts could hold to make sure they could hold the number of books removed from each floor. So this ended up being ten carts. We'll show you in the next picture.

>> Narda Tafuri: Okay. And there's the carts. Shelly and I took the first two sheets of the list to be pulled, of the books that were going to be pulled into this sample test run to make sure our instructions were accurate, and also to estimate the time it would take to do this. This was helpful in training the

rest of the staff, because we became aware of a number of problems they might encounter, which we'll talk about a little later. We purchased extra supplies before we began the project, including highlighters, gloves and plastic bags for moldy books. We also purchased 12 additional book trucks, which we needed because our book trucks were over 20 years old, and some of them were not that stable. So they were purchased not just for this project. And in addition, we rented the special library moving cart that you see in the picture that were used to store the books once we pulled and the processing was complete.

>> Sheli Pratt-McHugh: So now we'll talk a little bit about the work flow for the project. We put together a team of staff from access services and technical services to work on the project. We developed a schedule with the morning shift and an afternoon shift so that people wouldn't get burnt out or tired, and this also helped with covering vacations or time slots for different meetings and whatnot. So we had a backup person for each shift or kind of a floater person who could jump in where we needed them. Jean Lindville, our assistant dean, she was able to print the titles that we were going to pull and divide it up by floor. So we worked floor by floor.

The team members in charge of pulling would take one sheet of titles and deliver it to the work room for processing. So it worked out that about one sheet of titles was equal to one book truck.

The team members who handled processing were mostly -- the team members in charge of pulling -- the team members who handled the processing were mostly cataloging and serial staff, would then work on one book truck at a time and we wanted to keep the books in cull number order as much as possible to make double checking easier so when the truck was finished processing, it was moved in to the storage room on the storage cart. The processing entailed reviewing the bib record to make sure the title and hand matched the title on the list, and adding the item to a list in Sierra. And then at the end of the day, I would look at the Sierra list and I would do a global edit to change the location codes and the items type to the offsite storage location and I would also double check the number at this time to make sure the number processed for the day matched the number on the sheets for that day.

>> Narda Tafuri: Pretty early on, we realized it wasn't going to be that easy. We started to encounter cataloging errors. The processors were trying to fix the errors as they found them, but we realized that was slowing down the overall process. So after the first week, we decided to set a problem titles aside, so we placed a dedicated cart in both the work rooms for problems called the problem cart, and dealt with them once each floor was completed. We did one floor at a time, so when this room was full and the floor was completed, Iron Mountain came to pack up the materials and take them to their facility. After Iron Mountain took each floor, they entered the titles into their system and provided us with a count. Then Jean Lindville made sure their account matched our account for titles that had been processed. Access services staff then went back to the stacks to shift the collection and clean the

shelves. We originally thought that that could be done during the pulling steps, but we realized that that would slow down the work flow, and decided to do it later.

>> Sheli Pratt-McHugh: So here's a picture of our problem cart. Some problems included those old smart bar codes that were not properly matched to the right book, so they got swapped with books next to them on the shelves a lot of the times. We also encountered some books that were pulled or mismatched, and we'd have to go back to the shelves to pull the correct title. We also encountered a lot of incomplete records, and we kind of had to decide whether to enhance them or leave them brief. Some books were old when we pulled them, and we realized they were actually -- oh, some books were really old, but when we pulled them, we realized they were actually recently purchased, so we didn't want to send something that was a recent acquisition, and we ended up keeping it here in the library.

We also found a lot of titles that had incorrect editions in the catalog record so we had to make sure we were still sending the right book, even if it was a different edition in the record.

Oh, some books were also really fragile and were completely falling apart, so we had to decide if we needed to repair them and then send it or keep it here and bind sit, or completely discard it if it was beyond repair.

We have one more poll -- two more. Have you reviewed your current catalog records for problems yet?

So many of you have, which is good. So you're way ahead of where we were.

>> Narda Tafuri: Just quickly, that problems were basically -- that the two systems are system and Iron Mountains didn't talk. Some departments actually wanted to go further with this project, and so we re-examined their collections and were actually able to weed some titles. We also were able to re-examine duplicate titles and were able to weed those, and because of the success of our project and our open communication with faculty throughout the project using our library advisory committee, we now have a template for future weeding or relocation projects.

>> Sheli Pratt-McHugh: We can skip the final poll. But so far the project has been really successful. We've only retrieved eight titles this school year, so that's less than we predicted. We thought we would get about a 2% return, and that's what we budgeted for, so we're still ahead of our budget. Our faculty were very happy with their inclusion in the process, and now they feel less resistant and more open to future projects.

This really facilitated a lot of conversations amongst departments, and the library advisory committee and everyone involved had only positive things to say about the project. Do you have any questions?

>> Santi Thompson: Well, thank you, Narda and Sheli for that great presentation. We do have a couple questions, but we're actually out of time, so we will transfer those questions over to your online forum, and we will be heading in to a break here soon, but I did want to let folks know that if you had difficulties hearing or viewing Helen's video, which was the previous session to this one, we encourage you to leave the live stream during our next session coming up after the break, which is the lightning round videos and you can find the lightning round videos at a link that I'll be posting to the chat here pretty soon, and just remember, if you do leave, to see the lightning round videos that we also hope you stay and engage with all the poster presenters, both lightning round and off the live stream poster presenters, who will be available to answer questions through the online forum after the lightning round session ends.

So now I'm going to hand it over to Matt, who will lead us in to break, and we'll talk to you all soon. Thanks.

>> Matt: Thanks, Santi. And thank you again to all of our speakers. We'll take a short break. We'll be back in about seven minutes, at 3:40 p.m. eastern time, after which we'll begin our lightning round, followed by the poster discussion forum at 4:20. So remember to join the conversation and discuss today's sessions in the ALCTS Exchange online forum and we will reconvene either in the live stream or on the Web site if you prefer to watch the lightning round separately at 3:40 p.m. eastern. See you then.