

Counting Our Blessings

Inventory of a Roman Catholic Seminary Library

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The presence or absence of items in a library collection and the accuracy of the catalog compel library managers to conduct regular inventory. Inventory involves almost every library function—management, circulation, acquisitions, cataloging, reference, special collections, collection development, repair, and shelving. Therefore, inventory affects the library staff, patrons, and related groups such as administration and faculty in an academic institution.

Inventory management requires attentiveness to the individual item and a corresponding overall collection viewpoint. Project managers must be able to respond to both the details and the greater institutional demands. This chapter will use basic project management principles and steps to explain the inventory process at the Cardinal Stafford Library.

The Cardinal Stafford Library is the library of St. John Vianney Theological Seminary (SJVTS), which is a major seminary serving the Roman Catholic tradition for the Archdiocese of Denver in Colorado. The Seminary also receives men from 13 other dioceses and several religious orders. The primary patron base is about 120 seminarians in formation to become ordained priests in addition to faculty. At the time of this writing, the library also served a graduate school of theology for lay people called the Augustine Institute. The Saint Francis School for Deacons, a division of SJVTS forming men for the permanent diaconate, also has access to library resources. In addition, SJVTS has a lay division with educational programs such as the Catholic Biblical School and the Catechetical School.

The Cardinal Stafford Library has over 173,000 items in its collection as of October 2024. The collection is classified using the Library of Congress system. To date, the library has completed six inventories of the entire collection. The first two inventories used the SirsiDynix Symphony integrated library system (ILS). Following a migration to OCLC's WorldShare Management Services (WMS), the inventory from 2017 onward has happened in this ILS.

Project Management and the Library Inventory Process

Library inventory serves many purposes. First, inventory supports the mission of the library and its overall institution (Henry, Longstaff, and Van Kampen 2008, 113). For example, if an institution's mission is to prepare men for the Roman Catholic priesthood, inventory would contribute to that mission by having an accurate record of the books available to those men as they study and prepare. The more accurate the library's catalog, the better it reflects the collection. An accurate catalog contributes to confidence in the overall library, staff, collection, and services (Sung, Whistler, and Sung, 2009, 323; Xu 2018, 44). It shows care of the collection, which transfers to care of its patrons and the larger community or institution (Braxton 2005; Sung, Whistler, and Sung, 2009, 314).

Another purpose of the inventory process is to review subject areas that have increased or decreased by the number of volumes in the collection. This is achieved not only by visual assessment of the

materials on the shelves but also by various reports of withdrawn items and newly added items. Shifting is often an indicator of this type of collection information. Additional purposes of inventory include assessing areas for shifting, growth, or weeding (Braxton 2005).

As library staff members assess collection and shelf space along with inventory, they increase their awareness of the condition of the collection. Physically placing hands on the items in the collection, book by book, shelf by shelf, produces greater familiarity with the collection. The time spent physically in the stacks is a byproduct of collection maintenance (Braxton 2005).

Another benefit of inventory is that library holdings are confirmed for insurance purposes. Library disasters remind library directors that an accurate record of their stacks is crucial if items are lost or damaged due to theft, floods, or fires. Claims can be supported with a recent inventory (Oehlerts 2009, 73).

Finally, inventory contributes to the story of the library. Each inventory event will bring to light parts of the collection or individual items that are unusual, important, or special.

Basic Project Management Steps

Pre-Project Planning

The first step is to gather information about the project. Knowledge of the current state of the collection and when the last inventory was completed, if at all, will be the basis of many decisions by the project manager (Perera 2023, 21). The project manager should consider whether this inventory will be partial or full (meaning one part of the collection, a sample, or the entire collection). Possible dates for conducting inventory should be studied. For example, an academic library may use summer break for this purpose. At the Cardinal Stafford Library, inventory has been started on smaller parts of the collection in March, and the main stacks have been inventoried during summer break.

Library inventory policies will be the foundation for project management decisions. Policies are made by the library director with the approval of the administration of the institution and any relevant committees (academic council, library committee, etc.).

Library inventory policies should work with any existing policies of the larger institution. Considerations could include frequency, type, whether to be open to circulation or patrons, and what to do with the information.

A library inventory policy may include frequency of inventory or schedule. For example, ongoing inventory is usually done anytime a staff member has contact with an item. Annual inventories of an entire collection may be easily conducted on smaller collections. Other intervals may also be selected based on a variety of factors. For example, every other summer may be a good choice for an academic library when the students and faculty are not in classes or on campus. Frequency can also increase or decrease for a particular part of the collection. For example, if a library has relocated a rare books collection, the staff would conduct a pre-move and post-move inventory to ensure that all items were relocated successfully.

The process and procedures followed for inventory also depend on the cataloging system used. The ILS used by the library will have a process for electronically marking individual items as inventoried. For example, OCLC's WMS product uses regular item barcode scanning in the Check In function. Other systems require a scanner that stores barcodes, which are uploaded later to the ILS. A printed list is also an option if your chosen collection is small or there would be difficulty in using a barcode scanner or laptop.

Other decisions to make are related to the practical aspects of drawing resources to conduct inventory. Closing the library, stacks, or certain areas of your collection during inventory could make the process easier and faster. An important consideration is that closing could be inconvenient to patrons. If closing is selected, other options may be offered to serve patrons—for example, some limited hours, extended holds, or longer checkout times. Consider the ability and availability of staff or volunteers working on inventory and the other responsibilities and tasks they may have to handle. If closing for a few weeks allows staff to focus and complete inventory, then it could be the most effective option.

The personnel needed to complete inventory depends on the scale and type of inventory. Consider that the staff may be using stepladders, reaching up or down, carrying heavy books, and repetitively pressing a scanner. Inventory tasks can be physically demanding, especially over long periods of time. Staff members may have to adjust their workday to add time for inventory. Consider the tasks that may be deferred during this time. Plan accordingly if overtime

is required of your staff. Volunteers may not be able to commit to the time needed to complete an inventory. Volunteers are unpaid so the budget would be unaffected. Some volunteers are unskilled and may require more supervision. In academic libraries, students are sometimes recruited for inventory. Students may be similar to volunteers in skill level but may be paid. Most students can be flexible with schedules and may be physically able to handle the work (Perera, 2023).

Another practical consideration is weeding or deaccessioning items from the collection. Weeding can take place before inventory to reduce the number of items inventoried. Weeding before inventory can also make room for shifting. Weeding after inventory may allow more time to assess whether an item should be removed.

Shifting can also take place either before or after inventory. Shifting before inventory may be helpful because tight areas can be hard to scan or reach easily. Shifting after inventory can be saved for areas that are lower priority.

The facts gathered during this crucial stage should lead to possible outcomes. Outcomes or deliverables will help to plan the budget, staff, and schedule (Perera 2023, 27–28). For example, if the expected outcomes include significant book repair and replacement, the budget should include repair supplies, bindery costs, and replacement tasks and costs (Perera 2023, 21). For example, the outcomes for the first inventory in 2012 at the Cardinal Stafford Library were dusting the books and shelves, repair, and catalog reconciliation.

After the initial information gathering, all inventory activities should be defined. For example, in 2017, we planned to use our new ILS to conduct a full inventory from March until July. Inventory scanning would be conducted by two members of the staff with support from the cataloger. Laptops with scanners were prepared. Staff members were assigned call number ranges. Inventory anomalies went to the cataloger for corrections. After gathering information from previous inventories, these decisions were made in the fall semester.

The appropriate authorities should be consulted for approval as soon as the preliminary plan has been created. For our six inventories, the seminary administration has approved the inventory projects at the fall semester library committee meeting, with the final approvals of the academic dean and rector.

One area of concern within the field of project management is scope creep. Scope creep is when work that was not included in the original plan is added (Searcy 2018, 103). This can be expensive and

have financial or staff time or resource implications. Avoiding scope creep happens in the pre-project planning process by gathering as much information as possible and then making firm decisions about the work to be done (Searcy 2018, 102).

Communication is the responsibility of the project manager during all phases, and especially during pre-project planning. At SJVTS, inventory dates, locations, and other details were provided to faculty, seminarians, and other patrons. Email and word of mouth were our small community's primary means of communication.

Project Planning

At this stage, the project plan should be prepared by the project manager listing activities and milestones. The project plan should document how to accomplish inventory (workflow), who will perform the inventory (team), and when the inventory will be accomplished (schedule with milestones; Perera 2023, 22). A Gantt chart, software, or online planning websites are options to create a project plan. Many options are free or inexpensive. A project planning tool should be compatible with the inventory budget and scale. Updating this information and communicating it will be essential throughout the project.

The project manager will share the project plan with the team and other relevant parties, such as supervisors or administration. Depending on the level of information needed by the various parties, the appropriate information should be made available. For example, the team scanning books for inventory needs the workflow and schedule.

Implementation

As the inventory proceeds, the project manager will monitor the inventory workflow; maintain the schedule, budget, and staffing; and communicate with the relevant people or groups. Implementation will include changes, working with reports, consideration of electronic resources and special collections, as well as budget.

The project manager should handle changes to the project, updates, achieving milestones, and setbacks with clear communication with the affected people. For example, a shelf unit was

discovered to be leaning during one inventory. The inventory in that call number range was halted while the facilities manager and library director conferred on the issue. The team was able to move to another section without impacting the budget or schedule negatively. Communication was critical while updates to the plan were made so that workers were able to continue inventory safely.

Before the first book is scanned, the project manager should provide a report or list that includes the items in the collection or section to be inventoried. The list should include as much information about the individual items as possible. Sorting data from a report should allow for separating by date inventoried, item location, status, or other information that is relevant to a particular inventory. Spreadsheet software is usually used for this purpose. Reports may be able to be run at various intervals based on the other facets of the inventory conducted. Changes to the catalog may be made based on the results of the report and the process of reconciling the report with the collection. Results of reports also show where budgets have been spent or where they need to be spent in the following fiscal year. Inventory ensures that there is proof of the need for repair, replacement, acquisition, or deaccessioning (Braxton 2005, 53).

An inventory project plan may include electronic, digital, or multimedia types of resources such as CDs or DVDs. Patrons and staff may be confused or frustrated by broken links or inaccurate records. Website cleanup could be considered part of this process. Inventory can be a time to evaluate whether you can or want to create or absorb a special collection. Inventory of special collections helps to ensure that all items that belong in a particular collection are in the right location.

Another important consideration in the implementation phase is the execution of a planned budget for the inventory. Personnel, supplies and equipment, and collection maintenance are a few of the items that a project manager may consider for the inventory budget (Searcy 2018).

Thinking about areas of concern can span the entirety of the project. Budget and scheduling issues arise from scope creep and lack of information during the pre-project planning stage (Searcy 2018; ALCTS 2019). Project managers can reduce the impact of budget and scheduling problems by remaining firm in the project plan and discussing solutions with other decision-makers. (Searcy 2018, 103).

As the end of the project nears, a meeting should be held to discuss lessons learned and future tasks. Inventory often leads to other

projects such as large-scale shifting, weeding, acquisitions, or cataloging changes.

Communications

Throughout the project management process for inventory, communication has been discussed. All aspects of the project require communication with specific groups or individuals. The project manager is responsible for communication with the team, decision-makers, and patrons. The project manager expects to share the schedule, workflow, and other relevant details with the team conducting inventory (Searcy 2018; Perera 2023, 28). Decision makers may expect to view the schedule, budget, and outcomes from the inventory process. This may be in the final report. Patrons should expect to receive information as it pertains to accessibility to the collection, the staff, and the library facility. Websites, emails, and other methods of reaching the patron base should be employed to share these messages. Regular updates to all parties of progress or changes are important. The conclusion of the inventory should be communicated to relevant groups. Outcomes and next steps should be presented to decision-makers (Perera 2023).

Conclusion

Inventory at any library requires project management principles and practices. In the presented SJVTS case study, it was crucial to keep in mind library staff, patrons, and related groups when considering the impact of the project from pre-project planning to plan execution, implementation, and its implications, to closing the process in advance of the next inventory.

Inventories conducted within a project management framework may benefit from organizational and communication elements. Basic project management steps, budget, communication, and areas of concern apply to library inventory. Project managers must be able to respond to the details of a project and the greater institutional demands.

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