Best Practices for Moving Items to Storage

Introduction

As libraries face collection space shortages many have turned to storage for at least a portion of their collections. Whether the space is a purpose-built, high-density storage facility or a re-configured space altered to meet the libraries' needs, moving the items to storage is a study in logistics. When done in conjunction with a shared print program, an additional layer of complexity is added to the enterprise. The best practice below outlines good, better, best, and aspirational processes for shared print programs to consider when already housing or moving things to storage that are part of a shared print program. The order, or applicability, of the steps may vary depending on the staffing and type of storage environment that items are being moved to, or are already in. A bibliography is provided at the end of this document for additional resources that go beyond this best practice. The monographs in particular provide planning details that may prove useful in planning a move such as charts to help convert number of books to linear feet, how to pull a book from the shelf ergonomically, and what to look for in an RFP if using a moving company.

This best practice is written for both shared print programs and members of those programs. The best practices below can be used by either and when specific, it includes that specification.

Selection for Storage

The member library should review their collection development policy, shelf space, projected increase in collection volume, and future facilities or renovation projects to get an idea of what materials, as well as how many items, could be sent to storage. Materials frequently selected for storage include low use, rare or valuable, and/or archival items. Fragile items or those of an unusual size or composition are also often selected if the storage facility is better equipped to house and preserve those items.

Shared print program participation may also influence the items selected for storage. In some cases, member libraries committed to retain items precisely because they were already in storage. In other cases, libraries may choose to move items to storage as part of the commitment to retain these materials. In either case, libraries need to ensure that these materials are retained for the duration of the shared print agreement and are tracked through any moves to a different storage location.

Physical Inspection/Validation

Conducting a physical item inspection ensures the materials are in good shape and are available for use. Member libraries should review the Best Practices Guides for Preservation in Shared Print Programs and for Inventory for Shared Print Programs prior to sending anything to offsite storage.

A quick, visual inspection should be conducted to look for the following physical characteristics:

- Verify the appropriate labels are placed on the collection items e.g. item barcode, call number, and/or offsite storage labels.
- Add a "condition reviewed" note to the metadata.

- Ensure no more than minimal damage to collection items being sent off site. If more than minimal damage is found, take steps to correct the damage and reference the [Preservation in Shared Print Programs](#) best practice.

Use the following as a guide when conducting the visual inspection:

Good	Conduct a random sample of 25% of items being sent to offsite storage
Better	Conduct a random sample of 50% of items being sent to offsite storage
Best	Conduct a random sample of 75% of items being sent to offsite storage
Aspirational	Check 100% of items being sent to offsite storage

Bibliographic Info Validation

The [Inventory for Shared Print Programs](#) outlines the recommended steps to take to ensure accurate bibliographic information of items that are being inventoried. These criteria, and levels, also apply when moving items to storage as ensuring that the record accurately reflects the item is a crucial aspect for storage and retrieval.

Transfer and tracking

Transferring materials to storage requires a plan that addresses not only what is moving to storage, but also how the items will be transferred and how they will be tracked through the moving process. Factors that can impact some of these decisions include: the total number and relative size of the volumes moving, the location of the collection and the storage facility, availability and locations of elevators and loading docks, where the books are moving to and whether the books need to be kept in call number order, and the timeline for the move. Decisions that have larger budgetary implications are the availability of equipment and supplies for the move, as well as determining who will move the collection. Below are the best practices for transfer and tracking of the collection. Each level presumes all checks of any/all preceding levels.

	Good	Better	Best	Aspirational
Staff	Staff, students, or volunteers	Staff or moving company	Dedicated, trained library staff or reputable library moving company	
Container	Box	Sturdy bin with lid or book truck (regular)	Book trucks (specialized) for moving books	Book trucks (specialized) with waterproof sheaves
Book Placement	Stacked	Spine down or stacked 3-4 high	Upright or spine down	

Packing Material		Yes	Yes	Yes
Tracking Level		By bin or book truck	By item	By item and container
Environmental			Covered loading docks	Outdoor temperature closely matches inside temperature
Vehicle Transport		Bins stacked 4 high or less or secured carts	Vehicle with lift gate designed to hold and secure totes or carts	Temperature controlled vehicle
Security/Safety	Elevator reserved	Non-public staff or freight elevator	Break or non-peak hours	Library or area closed

Ingestion and Storage

See the [Best Practices for Shared Print Storage Environments](#) for recommendations regarding the storage environment. The type of facility and shelving chosen will dictate choices regarding some best practices. The recommendations below are facility agnostic.

Upon arriving at the storage facility, each item should be checked in and shelved in its new location. Depending on the tracking mechanism used during transfer, materials should be compared against the tracking lists, discharged, and/or marked received.

If multiple institutions use the facility, each institution's items should be at a minimum be tracked separately to facilitate recordkeeping and may even be kept in separate, clearly defined spaces.

Each level presumes meeting all preceding levels.

Good
- Items are checked in and shelved at the storage facility within 5 days of arriving at the storage facility.
- Utilize an inventory system that allows staff to identify that a specific barcoded item is stored offsite.
- Store oversized/heavy times and/or high usage items on lower shelves.

Better
- Items are checked in and shelved within 3 days of arriving at the storage facility.
- Utilize an inventory system that allows staff to identify a specific barcoded item on a specific shelf within the storage facility.

- Items are given an internal storage identifier or location. This identifier should be added to the item record of the owning institution.
- Store items by size, increasing the number of items that can be stored in a space.
- Store items in trays designed specifically for book storage.
- Separate special format items (non-book formats) in exclusive shelves.

Best
- Items are checked in and shelved within 1-2 days of arriving at the storage facility.
- Utilize an inventory system that allows staff to identify a specific barcoded item on a specific shelf within the storage facility and that can generate a retrieval list based on the item's location and optimizing the retrieval time/trips.
- Items are sorted for size and format and given an internal storage identifier. This identifier should be added to the item record of the owning institution.
- Use an inventory management system that integrates with the Library's Integrated Library System (ILS).
- For multi-institution facilities, only one institution's items should be processed at a time to prevent mishandling.
- Vacuum items to reduce dust and other contaminants being introduced to the offsite storage facility.
- Provide staff training for care and handling of oversized/heavy/delicate collection items.

Aspirational
- Items are checked in and shelved the day they arrive at the storage facility.
- Store items available to the Shared Book Repository in a designated area of your offsite storage facility.
- Use an inventory management system that integrates with the Library's Integrated Library System (ILS).
- Design a space management system and shelf layout based on container size and position on the shelf to maximize storage space.

Best Practices for Ingestion and Storage	Good	Better	Best	Aspirational
Items are checked in and shelved at the storage facility within X days of arriving at the storage facility.	5 days	3 days	1-2 Days	Same Day
Utilize an inventory system that allows staff to identify that a specific barcoded item is stored offsite.	X			

Utilize an inventory system that allows staff to identify a specific barcoded item on a specific shelf within the storage facility.		X		
Utilize an inventory system that allows staff to identify a specific barcoded item on a specific shelf within the storage facility and that can generate a retrieval list based on the item's location and optimizing the retrieval time/trips.			X	
Store oversized/heavy items and/or high usage items on lower shelves.	X			
Store items by size, increasing the number of items that can be stored in a space.		X		
Store items in trays designed specifically for book storage.		X		
Items are given an internal storage identifier or location. This identifier should be added to the item record of the owning institution.		X		
Separate special format items (non-book formats) in exclusive shelves.		X		
Use an inventory management system that integrates with the Library's Integrated Library System (ILS).			X	
For multi-institution facilities, only one institution's items should be processed at a time to prevent mishandling.			X	
Vacuum items to reduce dust and other contaminants being introduced to the offsite storage facility.			X	

Provide staff training for care and handling of oversized/heavy/delicate collection items.			X	
Store items available to the Shared Book Repository in a designated area of your offsite storage facility.				X
Design a space management system and shelf layout based on container size and position on the shelf to maximize storage space.				X

Retrieval and Use

Discovery and the delivery of items should not be impeded just because they are housed in a storage environment. Please see the Discovery and Disclosure of Items in Local Systems and Best Practices for Resource Sharing & Access for other recommendations.

In addition, once a request is received it should be delivered in timely manner as below:

Good	Requested items are retrieved and delivered within 5 days.
Better	Requested items are retrieved and delivered within 3 days.
Best	Requested items are retrieved and delivered within 1-2 days.
Aspirational	Requested items are retrieved and delivered the same day.

Additionally, once the item is returned, it should be checked again for condition and reshelved according to the ingestion and storage section of this document.

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