The 'Missing' Link: A Collaborative Effort to Improve the Accuracy of Our Holdings

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The “Missing” Link: A Collaborative Effort to Improve the Accuracy of Our Holdings

By

Kelly Hayden & Angelina Brown
A joint effort between Access Services and Technical Services to manage a large number of missing items in the catalog by:

- Identifying items as “Missing”, “Lost-Library Applied” or “Lost-System Applied”
- Assessing a need for policy in regards to missing items
- Creating a workflow to manage current and future missing items
Background

Campbell Library, the Glassboro Campus branch of Rowan University Libraries, houses a physical collection of over 300,000 books and DVDs.

In the summer of 2015, the library completed its first inventory in almost two decades. Approximately 8,500 items were identified as missing during this process.

The identification of these missing items prompted the Access Services and Technical services departments to take a closer look at how they are managed in the catalog.
Definitions

- **Missing**
  - Not charged to a user
  - Manually applied by staff

- **Lost-System Applied**
  - Charged to a user
  - More than 30 days past due
  - Automatically applied by ILS

- **Lost-Library Applied**
  - Formerly charged to a user
  - Manually applied by staff
Questions Posed

➢ What is our policy on missing items?
➢ How long should missing items remain in the catalog?
➢ Can these items be replaced?
➢ Should missing items be viewable in the OPAC?
Realization

➢ No past policy or procedure for managing missing items
➢ Displaying missing records is not useful to the user
➢ No reason to keep records for missing items in catalog if missing for a reasonable amount of time
➢ Replacing relevant material will require collaboration with subject liaisons
A shelf list was created to identify records that were duplicates with a missing copy. If a physical copy was found on the shelf, the missing item record was deleted from the catalog.
Step 2: Create a Policy for Missing Items

Purpose
Rowan University is committed to facilitating library users’ efficient and effective access to resources.

Accountability
The Rowan University Libraries’ faculty, staff (including student staff) and administrators are responsible for maintaining the collection and catalog to support research and discovery.

Policy
Books and other physical materials that have been identified as lost-system applied, lost-library applied or missing will be suppressed in the catalog after each review cycle. If the liaison librarian chooses to not replace the title, the record will be removed from the catalog and OCLC after a full review cycle (1 year / 2 reviews).
Step 3a: Develop a Procedure for Backlog

Removing missing items PRIOR to August 2016

➢ All missing items will be suppressed in the catalog
➢ Access Services will conduct one more review
➢ A list will be generated and split up by subject and divided amongst the subject liaisons
➢ Remaining missing items will be deleted by Technical Services when replacements are ordered and received
Step 3b: Procedure for Future Maintenance

1) Missing status is applied to material not located in the stacks

2) Missing status will be reviewed 2x per year
   a) A shelflist of missing materials is generated by Technical Services
   b) Access Services staff checks for items in stacks
   c) Missing items found on shelves are cleared of missing status and
      free text note in item records

3) Items missing after two unsuccessful reviews will be deleted from catalog

4) Subject liaisons are notified when missing items are deleted from catalog
   a) determinations whether to replace or update titles are made
Step 4a: ILS Record Update - Found Items

The list generated by Technical Services is split up and distributed amongst Access Services staff who search the shelves. If an item from the missing list is found on the shelves, it is pulled and processed:

- **Items marked Missing**
  - Missing status is removed in ILS

- **Items marked Lost-System Applied**
  - Checked against a database of users who have been charged for lost library items
  - Lost-System Applied status is removed in ILS

- **Items marked Lost-Library Applied**
  - Lost-Library Applied status is removed in ILS
The remaining missing items will be processed in bulk by Technical Services

- A new missing list is generated
- Free text note will be appended with the date items were reviewed
- Missing items will be suppressed in the catalog
  - Not viewable in the OPAC
- Any items “not found” 2x are identified and sent in a list to the Collection Management Librarian
Items marked missing 2x are identified, added to a list, and sent to the Collection Management Librarian. The list is split by subject and sent to the appropriate liaisons for review. Subject liaisons have 2 weeks to review the list and decide whether or not to replace missing titles. When the review period is over, Technical Services staff will delete the missing items before ordering begins.
Issues

● Children’s and Oversize collections
  ○ Failed inventories
● Missing records not removed before replacements were ordered
● First cycle of new procedure will happen this summer
  ○ Only dealt with missing items PRIOR to 2016
  ○ Children’s and Oversize missing items will be dealt with in this cycle
Goals for Next Cycle

➢ Complete one full cycle per year
➢ Adhere to pre-set time parameters for each step
➢ Provide users with the most accurate representation of our collection
➢ Improve database management with scheduled inventories
Conclusion

The first attempt of this project lead us to identify and correct problems with the procedure and to set goals for the next cycle. During that cycle, 1,152 of the 7,500 original missing items will be removed from the system. 652 of those remaining items are in the Children’s and Oversize locations.

This project has helped streamline workflows between two departments by creating a policy and setting a procedure that can be easily followed and maintained in the future. It has also improved our ability to maintain accurate holdings in the catalog and in turn provided users with a better overall experience.
Questions?

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