Floating Collection in an Academic Library: An Audacious Experiment that Succeeded

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Abstract

Can a floating collection thrive in a large multi-campus academic research library? Floating

collections have been successful in public libraries for some time, but it is uncommon for

academic libraries and unheard of for a large academic library system. This article will discuss

the investigation into the feasibility of a floating collection at Penn State University Libraries, its

implementation, and continuation for a period covering 2009 through 2015. Attaining the

floating collection, limited to monographs in the general stacks of campus libraries, proved to be

easier to implement than imagined and resulted in unintended benefits as well as some surprises.

Keywords: Academic libraries; collection management; floating collection; library

cooperation; Penn State; Penn State University; Penn State University Libraries; risk-taking

Floating Collection in an Academic Library: An Audacious Experiment that Succeeded

"If Penn State University Libraries collection is 'one collection, geographically dispersed,' why do we have to ship our books back to the library of origin after they have been returned by a patron?" This question, posed at a 2009 retreat for Penn State librarians, sparked the curiosity of Penn State University Libraries administrators, who wondered if this idea could become a reality. As a result, a task force was charged to investigate whether a book from one library could indeed remain at another library where it was borrowed by a user instead of being shipped back to the owning library, i.e. a floating collection. This article, covering a period from 2009 through 2015, will explore this extensive year-long investigation and testing phase, which led to a successful pilot program, and finally, to the implementation of a floating collection at Penn State. For the purpose of this article, a *floating collection* is a group of items that are not housed permanently at one specific library but instead are shelved in the library where they were most recently discharged.

Background

Penn State is one university comprised of over 20 campuses dispersed throughout the Commonwealth of Pennsylvania, with approximately 100,000 students. University Park is the largest campus, with more than 46,000 students. Enrollments at other campus locations range from around 500 students (Penn State Shenango) to 4,700 students (Penn State Harrisburg). These campuses primarily have lower-division courses for the first two years of course work and, once students are accepted into a major, their degrees can be completed at any campus offering that major. Included in the total student enrollment are over 12,000 students of Penn State World Campus, which offers online degrees and certificate programs. Penn State

University Libraries function as "one library, geographically dispersed" across 23 campus

locations, with one dean of libraries and a single library faculty and staff, including the medical

and law libraries. There are 13 libraries at the University Park campus; libraries at the 22 other

campus locations are known as Commonwealth Campus Libraries (CCL). The Libraries rank

eighth among North American research libraries as measured on the Association of Research

Libraries (ARL) Investment Index Rankings for 2013–2014

(https://www.arlstatistics.org/documents/ARLStats/index14.xls). All library resources and

services are offered to Penn State faculty, staff, and students, regardless of their campus

affiliation or location. Librarians at each location develop their collection to meet their users'

needs, but keep in mind broad use across all libraries. The Libraries collections number some 7

million items, including over 400,000 e-books and other online resources. A single Integrated

Library System (ILS) runs on the SirsiDynix Symphony® platform, which follows standard

circulation policies and procedures across all libraries. Material is shipped daily among libraries.

An "I Want It" feature displays within the catalog for a user to place a hold on an item and have

it delivered to a selected pickup library.

Rationale for a Floating Collection

Prior to the floating collection project, when a user returned a book it was either sent

back to its owning library for reshelving or routed to a different library to satisfy another user's

hold. However, since the Libraries are "one collection," why must the book be returned to the

owning library for reshelving? If such a book could remain at the library where it was returned,

the book would spend less time in transit back to its owning library. Logically, libraries would

save time by not having to package these books for transit back to the owning library and would

also save money by reducing the number of packages shipped. In addition, it is possible that the

"new to this library" book would be of interest to another user at that particular library and

possibly be borrowed more quickly than if returned to its owning library. Furthermore, a

floating collection may reduce the need for purchasing duplicate copies across libraries.

Literature Review

In addition to examining related literature, the task force found several useful discussions

about floating collections on the electronic mailing lists related to circulation and technical

services: ALCTS e-Forum (2010), SirsiDynix (2010), and LIB-CIRCPLUS (2010).

Subsequently, we distributed an informal survey via LIB-CIRCPLUS (see the appendix), spoke

further with a librarian who completed the survey, and discussed the concept with staff from a

public library just beginning a floating collection (Cobb County Public Library System staff,

2010). Lastly, the task force conducted an Internet search for libraries promoting a floating

collection. Several public library systems were operating a floating collection among their

branch locations with success, but the task force could not find a floating collection in an

academic setting via a Web search. This raised some doubt about whether an academic library

system could have success floating books. It should be noted that several years after our

investigation, Bartlett (2014) mentioned two small Ohio academic libraries floating their

collection.

Articles, electronic mailing list replies, and personal interviews were very positive about

aspects of a floating collection, including: reduction in shipping time and quantity of material in

transit, reduction of staff workload, and greater variety of materials available to patrons

(Dauphin County Library System, 2010; Duffy, 2006; Johal & Quigley, 2012). Public libraries

with a floating collection indicated that they move excess materials to locations willing to accept

them but warned of the occasional need to redistribute the collection (Cress, 2004; Sarasota

County Libraries, 2010). It was mentioned that time had to be allocated to monitor floating

collection activity and for developing consistent local practices (Bray & Langstaff, 2007;

Coopey, 2014). There were challenges such as "uneven distribution of materials among and

within branches . . . variation in the application of weeding guidelines . . . [and] implications for

staff . . . particularly changes to workload and workflow" (Canty et al., 2012, p. 68). In addition,

some staff viewed a floating collection as a threat to the development of local collections (FCPL

Floating Collection Project Team, 2010). Electronic mailing list discussions mentioned saving

staff time and improving customer service, but also highlighted problems such as balancing

collection overflow and shortages as well as the difficulty in locating locally purchased material

once it starts floating (ALCTS, 2010; FCPL Floating Collection Project Team, 2010).

The Investigation Phase (February 2010 – May 2010)

Initial Questions and Concerns

A floating collection concept was understandable and logical, but was it feasible for Penn

State University Libraries? The task force had several questions: what types of material should

float; what is the estimated volume of floating material; would there be enough available shelf

space in each library; could our local ILS support this model; would a floating collection work

for some library locations but not others; should we run a pilot and if so, which libraries would

participate; and will there be any shipping costs savings (both direct and indirect)?

While benchmarking, the task force became aware of the dissimilarities in

philosophy/purpose between a floating collection operating at public libraries and a possible

floating collection operating in a large academic research library such as Penn State. The

mission, focus, collections, and usage patterns between these types of libraries are remarkably

different. Public libraries with a floating collection allow most of their collection to float,

whereas we wanted only a subset of our books to float. Public libraries recommended an

aggressive weeding program before starting a floating collection. Although each campus library

weeds periodically, organizing a large scale weeding program prior to testing a floating

collection was not feasible. Plus, a large research library has a different approach to collection

development than a public library. The task force soon recognized the need to customize a

floating collection to fit the Penn State University Libraries environment.

Floating a collection was a tremendous risk-taking endeavor. From the beginning, there

was concern that this undertaking could disrupt standard system protocols for the floating books,

or worse yet, could result in major technical and service issues for the ILS, for the Libraries staff

and, most importantly, for our patrons. Even more critical was the timing. There seemed to be no

"ideal" time to attempt this undertaking since the Libraries are busy all year round. Even though

a floating collection was a reasonable and perceivably advantageous concept, the task force

doubted it could work within the framework of a large academic library across multiple campus

libraries using an ILS that had been customized over the years to adapt to the Libraries unique

demands. As the task force worked toward their goal, they were mindful of possible

consequences as a result of introducing floating books into this system.

Analysis of In-Transit and Shipping Data

An analysis of in-transit data retrieved from our ILS was conducted on all libraries to

estimate the potential volume of material that moved from one library to another for patron

holds, course reserves, or reshelving. This analysis helped estimate the magnitude of a floating

collection over the course of an academic year.   It also suggested potential shipping and labor

savings by not returning items to the owning library simply for reshelving. Upon seeing the

influx of material to University Park from the other campus libraries, the task force decided to

exclude University Park from the floating collection in order to avoid an unmanageable balance

in collections.

Driven by the uncertainty of a floating collection within our complex system, the Penn

State "floating" experiment was narrowed down to monographs in the general stacks locations at

the CCL. Then, to narrow the focus to a more manageable level for further analysis, shipping

data for the three CCL represented on the task force was examined. Shipping and packaging

data were manually collected daily at each of their libraries from March 3, 2010, through May

22, 2010. Data were taken on (a) the number of books and packages being returned to the

owning library for reshelving, (b) the number of books and packages sent to another library to

fulfill a hold, (c) the number of packages that would not have to be shipped (potential shipping

reduction), and (d) the net gain of books staying in the library (in order to estimate the additional

shelving space needed for floating books). The study revealed that anywhere from 137 to 647

books could remain at the library that last discharged the book. As a result, by including the

number of books shipped to other libraries to fulfill holds, one library had a net gain of 170

books, whereas another had a net loss of eight books.

System Set Up

We were one step closer to a floating collection when we discovered that our ILS,

SirsiDynix Symphony, had a feature within the software expressly designed to support a floating

collection. For better collection management, system documentation recommended creating a new floating item type prior to implementing a floating collection. For example, the BOOK item type in a library designated to participate in the floating collection would be changed to a new item type, BOOKFLOAT, for monographs in a stacks location. This new item type would identify the books that would float according to system policies. Following the documentation, Libraries system administrators created new circulation policies for the floating collection and loaded these on the Libraries test server (a separate instance of the ILS so staff can test new features). Since the ILS database was huge and the Libraries had created myriad customizations over the years, the task force had some trepidation about the testing and the outcome of the project. Would this subset of books function as other books in the system (in terms of holds, course reserves, discharging) yet be recognized as "floating" and remain in the library that most recently discharged them?

Retaining Original Home Location

To avoid patron confusion, public libraries with a floating collection standardize the home location in their ILS to display a single description such as "stacks" for all locations. In this case, there is no local ownership of books, so balancing collections is achieved by redistributing items from crowded locations to other participating libraries lacking items. Creating a single home location of "stacks" in our ILS for floating books, and thus disassociating a book from its original owning library, would result in millions of books no longer being affiliated with a particular library. The task force was certain the Libraries would not accept this consequential change and therefore decided to retain the owning library designation (the one that purchased the book) in the home location within the ILS. We reasoned that library faculty and

staff would prefer books be sent back to the owning library if overcrowding occurred at the library currently housing the book. In addition, it would be easy to send books back to the owning library if University Libraries administrators decided not to continue a floating collection. Another advantage was that donor attributions could still be identified in the online catalog record associated with the owning library.

Surveying Internal Stakeholders

Technical services stakeholders concluded there would be few processing changes, since the owning library was going to be retained in the home location field. Their main change was adding the new item type for newly acquired books. But we were unsure how librarians and staff would react to a floating collection. Would libraries be willing to let their books be shelved at another library, especially newly acquired books? When CCL stakeholders were surveyed, they understood the floating collection concept and most were willing to see a pilot tried within the Libraries, with some stating, "I want the collection to be used." Books were already sent to other libraries to fulfill holds, so a floating collection could be seen as an extension of that process. However, concerns were expressed, such as uncertainty about handling books needed for course reserves, shelving floating books, newly acquired books floating elsewhere, losing ownership of floating books, and whether floating books would be confusing to staff and patrons.

In considering the concept, one librarian noted that floating books could be a collection development bonus for the CCL. For example, several campuses participate in the "teaching international" initiative, in which a theme and a country or region is designated for a year-long, campuswide common focus for teaching and scholarship across the curriculum (Penn State Greater Allegheny, 2016). As students request books on the topic from other Penn State campus

libraries, the books would migrate to that campus and remain at that library for others to browse

and borrow without waiting for them to arrive from another campus library.

The Testing Phase (June 2010 – November 2010)

Testing the floating collection ensued during summer 2010 when there was less system

activity and thus a lower impact if any system mishaps occurred. During this testing phase,

several issues were uncovered.

Item Library vs. Home Location

A book record in the Penn State's public catalog displays both the item library (name of

the library where the book is located) such as *Penn State Harrisburg*, and the home location

(name of the location where the book is shelved: a specific floor or collection) such as *Penn

State Harrisburg – Stacks 2 Fl*. Since we retained the original home location for each book,

mismatched item library/home location combinations were displaying in the public catalog. For

example, a Harrisburg book that floated to Fayette was displaying the library as *Penn State

Fayette* but a shelving location of *Penn State Harrisburg – Stacks 2 Fl*. After examining the

system policies, we found that the text of the location description in the public catalog could be

edited from its current name (e.g. *Penn State Harrisburg – Stacks 2 Fl.*) to a more generic one,

(e.g. *Stacks – General Collection)* for all of the floating libraries without interfering with the

home location policy name. This was easily incorporated, since the participating libraries had

their collection on one or two floors. Unfortunately, the staff client side could not be edited so it

continued to display the mismatched locations.

Dormant Reserve

If inactive reserve control records are not removed from the system at the end of the

semester, they remain linked to the item's ID number. These inactive reserve control records prevented the transfer of a floating book from one library to another, so a major cleanup of thousands of records in the ILS database was required before beginning a floating collection pilot. Reports for inactive reserve control records were generated for each of the testing libraries, and staff reviewed each record to determine if it could be removed or its status changed. Finally, system reports were run to remove the inactive records. Uncovering this issue prompted a library-wide endeavor to clean up old course reserve records that had accumulated for almost a decade.

Not All Books Should Float

Books unique to a particular library, fulfilling a special mission, were identified and moved to a different location or changed to a different item type. Some were kept at the BOOK item type, which signaled the system to ignore them for floating. Eventually, a process was developed to keep the BOOK item type for some books in the general stacks areas while avoiding being automatically updated to BOOKFLOAT via system reports. This was achieved by adding a "no float – (campus code)" note in the extended information field of the book's record.

System Messages in the Staff Client

We became aware of changes on the staff client screens that would take some time for staff to adjust to if a floating collection was implemented. For example, an item record for a book currently on the shelf at the Fayette campus would show *FAYETTE* in the item library field, while displaying the owning library designator (e.g. *STACKS-YK*) in the home location and current location fields.

In addition, the floating collection feature resulted in an unfamiliar system behavior and operator alert message when processing a book with an expired hold. Because the system understood that this book was to remain at the library removing it from their "hold" shelf, an in-transit slip was not generated from the printer. Instead, a new system message displayed, *Item discharged; needs to be transferred to current library*, which signaled to the staff that the book would not be returned to the owning library, but would instead be shelved at their library.

Security Systems

During the testing phase, the task force also considered the security of the collection. Campus libraries use one of two types of security systems; an RF (radio frequency) tag or an EM (electromagnetic) strip. Exit alarms only work for the particular security system installed. To maintain full security coverage, it was decided that if a book floated from a library using a different security system, the receiving library would have to add their security tag or strip before shelving.

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The Pilot Phase (November 2010 – November 2012)

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In November 2010, the task force reported to the Libraries administrators that since the merits of a floating collection were speculative for a large academic research library such as Penn State, this intriguing concept could only be determined to work, or not, if a pilot was attempted. We were confident a floating collection would work: The testing had been successful, problems were resolved, and the floating collection feature did not "break" the test server. Plus, since the book's original location was not altered, the floating collection feature could be eliminated in the system and the books returned to their owning library if the pilot failed. The floating collection pilot would be limited to monographs in the general stacks of Harrisburg,

Fayette, York, and Hazleton libraries. Combined, these campuses had around 7,500 students, and their libraries held around 350,000 monographs.

On May 13, 2011, at the end of the spring semester, all floating collection system policies were created on the production server in the live environment. During the pilot, the task force monitored book movement among the pilot libraries and between pilot and non-pilot libraries, as well as with our resource-sharing systems. With a well-developed understanding of the floating books utility and the workflow, the task force tackled problems and issues as they arose.

Potential Showstoppers

Two potential showstoppers were identified during this phase that almost halted the pilot, but both were able to be resolved. The most critical showstopper was how the new BOOKFLOAT item type displayed in the public catalog. This new item type was not included under BOOK in an Advanced Search using the "Material Type" drop-down box in the catalog. If a patron limited a search to the item type BOOK, an incomplete results list was retrieved as 350,000 monographs were excluded. As a result, the pilot libraries instructed their patrons to do two Advanced Searches – one for BOOK and then one for the BOOKFLOAT item type, but it was unrealistic to assume patrons would figure this out themselves. Fortunately, at this time the Libraries were implementing a discovery service and therefore, instead of ending the pilot, librarians at the pilot libraries promoted the new discovery interface "LionSearch" to find local books. LionSearch is the name Penn State Libraries gave the Summon® Web-scale discovery system. Since LionSearch retrieves all related book item types (including both BOOK and BOOKFLOAT) with a single search, the pilot was able to continue. More good news resulted when ILS system administrators found a way to combine both the BOOK and BOOKFLOAT

item types into a single search in the Advanced Search utility. The addition of this customized

code in the catalog search was the turning point of the pilot; the task force now realized a

floating collection would work.

The second potential showstopper involved how our resource sharing systems integrated

with our ILS. Penn State University Libraries actively participate in the PALCI E-ZBorrow

(http://www.palci.org/palci-services), CIC (Big Ten) Libraries' Uborrow direct-borrowing

systems (http://www.cic.net/projects/library/reciprocal-borrowing/uborrow), and the Access PA

consortium database of public and school libraries in Pennsylvania

(http://www.powerlibrary.org/). The main issue encountered was the mismatched combination of

home location and item library in these systems. The E-ZBorrow and Uborrow systems' product

developer, Relais International Inc. (www.relais-intl.com), resolved this mismatching by adding

all of the possible mismatched locations combinations (e.g. FAYETTE STACKS-HN,

FAYETTE STACKS-YK) in both the E-ZBorrow and Uborrow databases so that these

groupings could be identified by their product when it conducted a search of the Penn State

Libraries catalog. The Access PA database is updated with Penn State holdings about three times

a year. Therefore, Access PA requests could be directed to the Penn State library indicated on the

last updated holdings file. A simple work-around process was developed to address this problem.

Staff at the library receiving the request notified the library housing the book to supply and

update the system. Documentation was created for this process and this issue was quickly

resolved.

Floating Collection Promotion and Staff Training

While the task force focused on technical issues with the staff client, catalog, system

server, and workflow during the pilot, we wondered how to measure the value of a floating

collection and whether it needed to be promoted. Was a floating collection of any interest to

patrons? Did patrons see a floating collection as a value-added service? Should the books be

placed near the "new book" shelf to promote the project? Did it save staff time? Was there a

reduction in shipping costs or in staff time spent shelving or preparing for shipping?

Since the mechanics of a floating collection occur "behind the scenes," the pilot was of

no interest to patrons. A Web page explaining the pilot was linked from the library catalog

(https://www.libraries.psu.edu/psul/access/floatingcollection.html). A comment survey linked

from this Web page produced two responses; one from a patron praising the idea, and the other

from a staff member asking an unrelated question. Originally some staff thought patrons would

be confused, but no evidence supported this. There were no patron complaints and few questions

at service desks. This affirmed for the task force that a floating collection did not disrupt the

normal flow of books nor inhibit supplying patron needs. Perhaps this lack of confusion was due

in part to patrons already familiar with the option of placing holds on items within the catalog.

The difference with a floating collection (and possibly of little interest to patrons) was that the

floating book would be reshelved locally instead of being sent back to the owning library. One

pilot library placed the "new to this library" books near their new book display area but

discontinued this practice when no significant results were seen.

Staff training focused on identifying the differences between floating books and other

material in the ILS. For example, since the "item library" field in the ILS staff client indicates

where the book is currently shelved, whereas the "home location" field displays the owning

library, it was necessary to create documentation to illustrate these changes and show how they

were reflected in the public catalog. There was not enough time during the pilot to adequately examine staff time or shipping savings, but it was assumed that there should be some shipping costs savings.

In addition, since only the four pilot libraries were using the BOOKFLOAT item type at this time, Acquisitions and Cataloging staff sometimes forgot to use it for their newly acquired books, so system reports were run periodically to identify and update the records to BOOKFLOAT.

As to whether a floating collection is useful or of any benefit to the Libraries as a whole, the task force reflected on the original question from the charge, "If the University Libraries collection is 'one collection, geographically dispersed,' why do we have to ship our books back to the library of origin after they have been returned by a patron?" We concluded that there is no apparent reason why a book needs to be shipped back to the library of origin as long as it is equally accessible to any who might need it.

Pilot Conclusion

At the conclusion of the pilot, the task force recommended that a floating collection, limited to monographs in the general stacks, be made permanent at 19 of the CCL. There were several reasons why the task force recommended expanding a floating collection at the campuses. One of the ideas supported by the Penn State Academic and Administrative Services Core Council is greater collaboration among the Commonwealth Campuses (Erickson, 2011). A floating collection could be viewed as a partnership among the CCL locations to increase efficiency and reduce costs. A floating collection concept would be more commonplace and less confusing for patrons and staff with increased library participation. In addition, there would be

less processing confusion for acquisitions, cataloging, and circulation staff if the BOOKFLOAT item type was consistent for books in stacks locations across all CCL locations. Logically, shipping costs should go down as fewer books are transported back to the owning library for reshelving. Finally, there is a method for returning books to the owning library if space issues arise.

Implementing a Floating Collection Throughout the Penn State Commonwealth Campuses

Being cautious about adding too many floating books to the system at one time, we slowly converted the books in three phases during three years. "Phase One" pilot libraries (Fayette, Harrisburg, Hazleton, York) were completed in May 2011. The other campus libraries were contacted about the project and given instructions about cleanup activities. By November 2012, "Phase Two" libraries (Behrend, Greater Allegheny, Lehigh Valley, Mont Alto, Schuylkill, and Shenango) were ready. "Phase Three" libraries (Abington, Altoona, Beaver, Berks, Brandywine, DuBois, New Kensington, Wilkes Barre, and Worthington Scranton) were completed in February 2013. This brought the total volumes available to float to approximately 1 million, with new books added daily.

Benefits

Some benefits unique to our floating collection were the record cleanups we performed in our system. Implementing a floating collection produced system error results not seen before, alerting us to issues we needed to resolve. We removed inactive reserve control records across all libraries and implemented an annual purge of these records. We fixed inaccurate catalog records and found many items mistakenly marked noncirculating in general stacks locations and discovered a way to exclude serials from floating. The best discovery was being able to combine

different item types like BOOK and BOOKFLOAT in one search in our public catalog.

Technical staff was able to apply this code to address similar issues.

In addition, we also experienced the typical floating collection benefits such as reduced

staff processing time and costs for shipping, a "refresh" to collections, and books spending less

time in transit resulting in faster fulfillment for holds (Coopey & Eshbach, 2013). In September

2013, a total of 8,710 floating books resided on the shelves of other floating libraries, By

September 2015, the number had increased to 25,700. Shipping data for these campus libraries

show a reduction from 38,544 to 31,623 packages for the years 2011 to 2015. It can be

concluded that a floating collection can contribute to less shipping. During this period, since

fewer books were being shipped and placed in transit, they were readily available for users in

their new library. It is worth noting that during this time the loan period for undergraduate

students increased to semester loans, which could have contributed somewhat to the shipping

reduction. One question we have not yet found a way to answer, due to huge system data

generated, is whether a book that ends up in a new library is subsequently checked out by a user

at that library.

We continue to have some issues associated with a floating collection. One is our

frustration with the limitations of our ILS floating collection feature. The staff client interface

cannot be customized to clearly indicate where a floating book is currently located. Plus, the

system restricts alternate ways for expanding the floating collection. But a more major change is

how campus librarians are embracing the "collective" collection. As books stay at other libraries,

campus librarians are seeing their collections change. Some question how to deal with books of

the same title or topic clustering at one library. Others debate whether to send excess books back

to the owning library or shift or weed their collection to fit the "new" books. Further analysis is needed on the impact of a floating collection on the Libraries' collection and on collection development. Overall, the new way of thinking about the mobile "collective" collection is a gradual process.

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Appendix

Survey to the LIB-CIRCPLUS LISTSERV March 2010

- What type of library do you have?

- What ILS do you have?

- What types of materials do you float?

- What is the size of your collection?

- How many libraries are in your system?

- Is there anything you think we should know?

- May we contact you for additional information? If so, please include your email address

  and phone number.