



APRIL 13-15



From Backlog to Breakthrough

Streamlining Technical Services with
Workslip Cataloging and LEAN Solutions

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SNO-ISLE LIBRARIES

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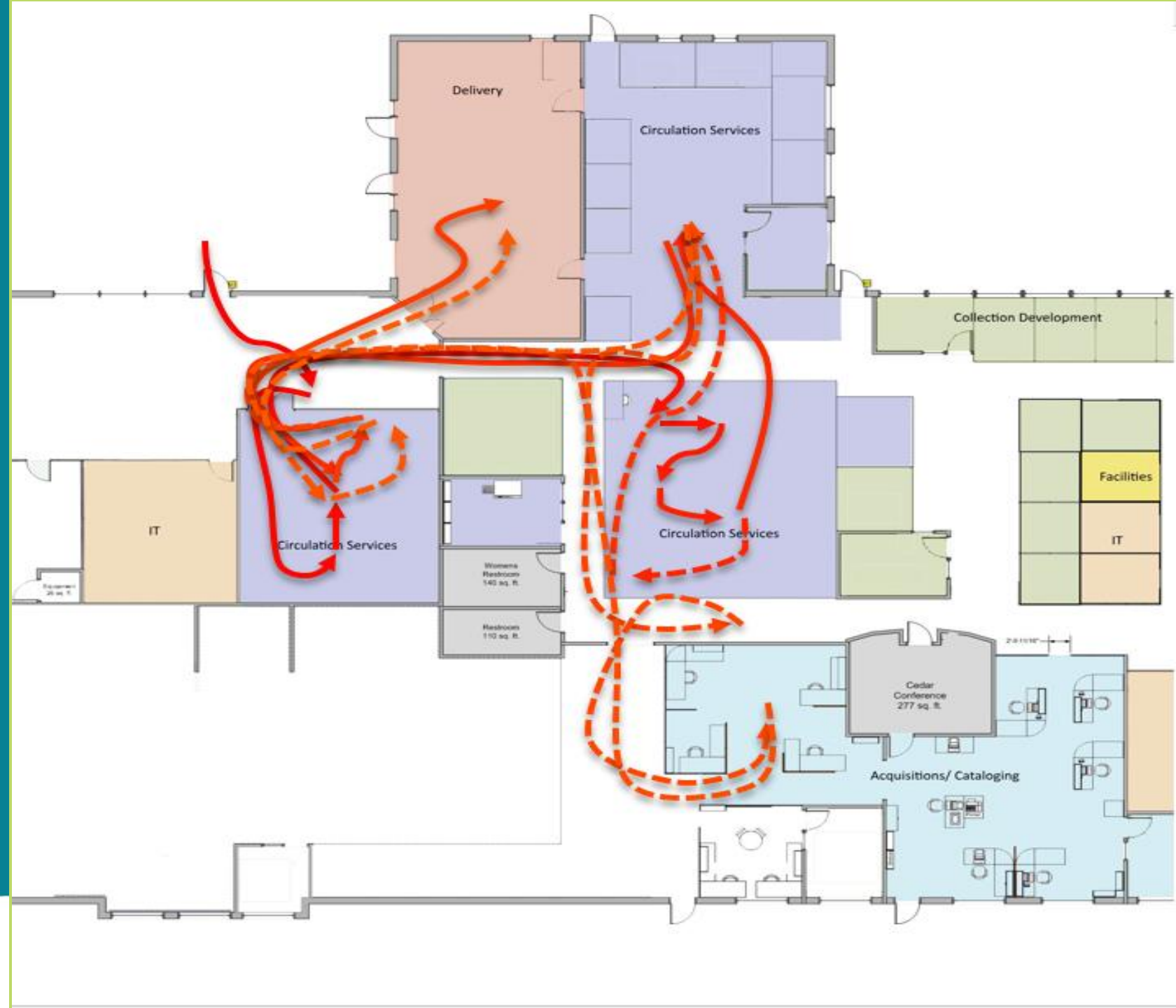


Why the LEAN process?

- ✓ **Serve Customers Better – Faster turnaround, fewer delays**
- ✓ **Reduce Extra Steps – Streamlined processes, less back-tracking**
- ✓ **Continuous Improvement – Every day, every task, getting better**



Before: 2014



Three New Workflows

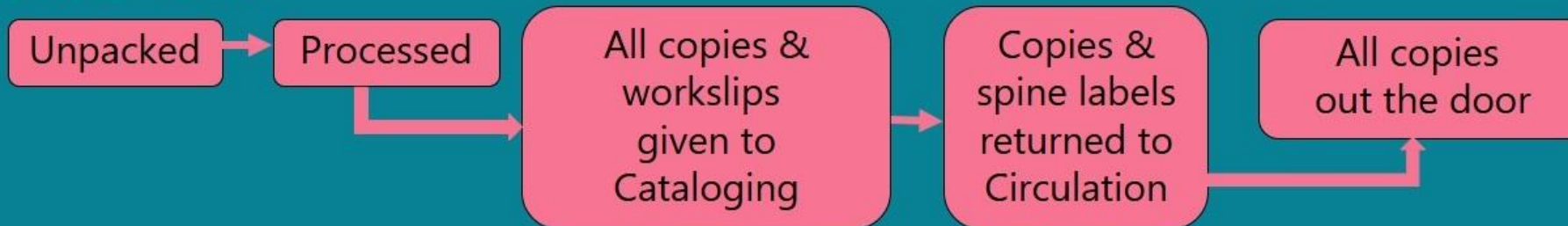
Shelf Ready



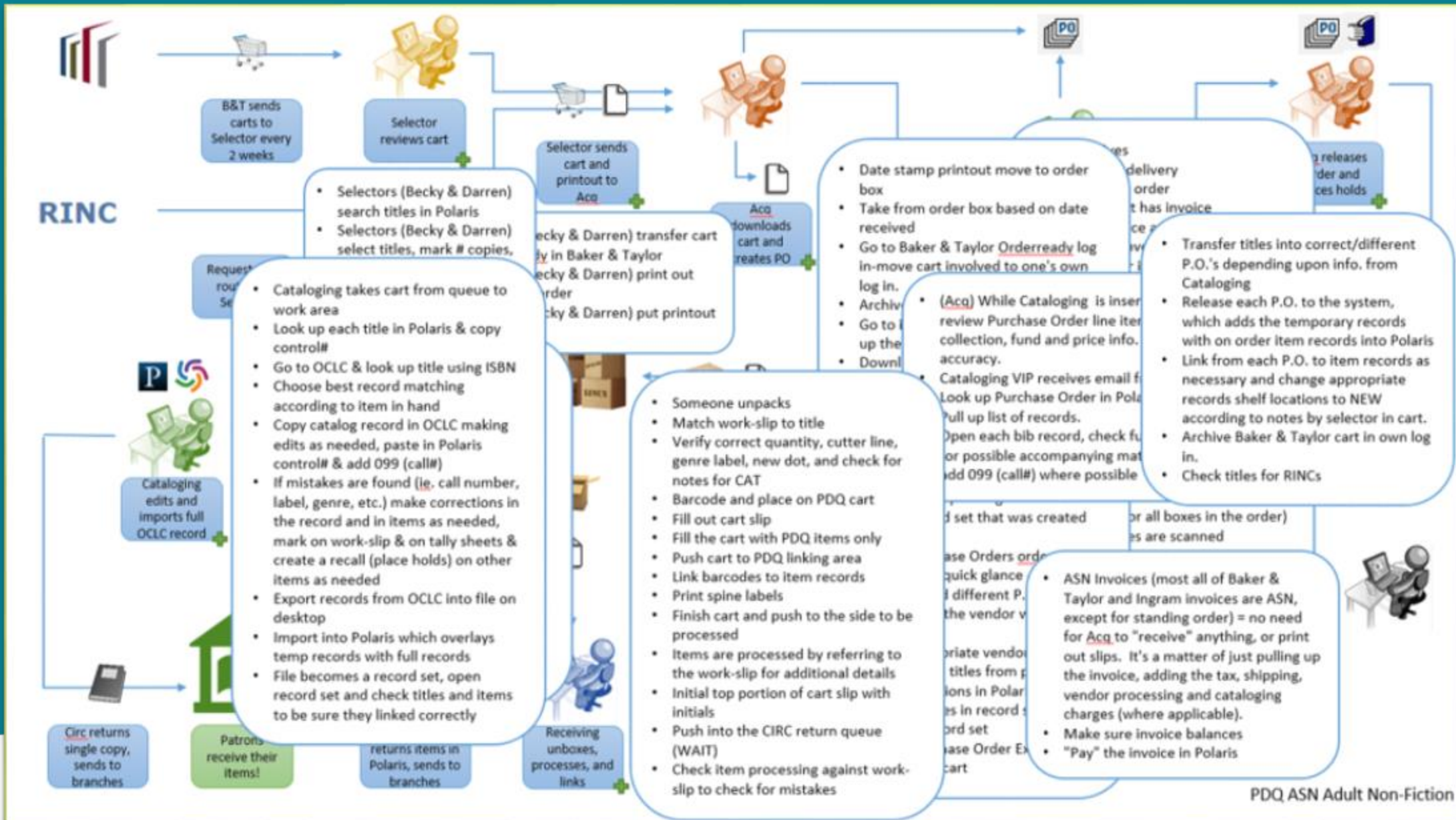
PDQ



NonPDQ



Tracked the Workflow



Cost-Benefit Analysis: Processing Budget

- » Vendor processing vs. in-house processing
- » Which is cheapest?
- » Which is fastest?
- » Constraints:
 - » Number of staff hours
 - » Vendor processing budget
 - » Supply costs
 - » LEAN goals

		Optimized by Staff Time Capacity Estimate					Total Cost if Optimized by
Processing Group	Collection	Expected Quantity to Order in 2017	Optimal Processing Flow	Vendor Processing	SRV Staff Time in \$	Supplies	
Single Disc Audiobook	T Audio	17	UNP	\$ -	\$ 26	\$ 12	\$ 38
Large Type	J LT	25	SVP (BT)	\$ 12	\$ 13	\$ 6	\$ 31
Large Type	T LT	62	SVP (BT)	\$ 29	\$ 33	\$ 15	\$ 76
Single Disc Audiobook	A Audio	73	UNP	\$ -	\$ 115	\$ 53	\$ 167
Biography	T Bio	83	SVP (BT)	\$ 39	\$ 35	\$ 20	\$ 94
Biography	E Bio	133	SVP (BT)	\$ 63	\$ 56	\$ 33	\$ 151
Single Disc Audiobook	J Audio	167	UNP	\$ -	\$ 262	\$ 121	\$ 383
Nonfiction	T NF	642	SVP (BT)	\$ 302	\$ 267	\$ 157	\$ 726
Multi Disc Audiobook	T Audio	695	SVP (MWT)	\$ 3,788	\$ 151	\$ 35	\$ 3,973
Biography	J Bio	895	SVP (BT)	\$ 421	\$ 373	\$ 219	\$ 1,013
J Music CD	J CD	1,030	SVP (MWT)	\$ 3,090	\$ 209	\$ 52	\$ 3,350
Multi Disc Audiobook	J Audio	1,500	SVP (MWT)	\$ 8,175	\$ 325	\$ 75	\$ 8,575
Single Disc Audiobook	E Audio	2,500	SVP (MWT)	\$ 1,175	\$ 777	\$ -	\$ 1,952
Nonfiction	E NF	2,652	SVP (BT)	\$ 1,246	\$ 1,104	\$ 650	\$ 3,000
International	Intl -	2,917	UNP	\$ -	\$ 1,740	\$ 1,983	\$ 3,723
Childcare	Childcare	3,057	SR (ING)	\$ 4,585	\$ -	\$ -	\$ 4,585
Large Type	A LT	3,197	SVP (BT)	\$ 1,502	\$ 1,694	\$ 767	\$ 3,964
Biography	A Bio	3,548	SVP (BT)	\$ 1,668	\$ 1,478	\$ 869	\$ 4,015
Graphic Novel	A GN	3,728	SVP (BT)	\$ 1,752	\$ 1,374	\$ 988	\$ 4,114
Graphic Novel	T GN	4,427	SVP (BT)	\$ 2,081	\$ 1,632	\$ 1,173	\$ 4,885
Graphic Novel	J GN	4,445	SVP (BT)	\$ 2,089	\$ 1,638	\$ 1,178	\$ 4,905
Board Books	Board	4,528	UNP	\$ -	\$ 774	\$ 679	\$ 1,453
Fiction	T Fic	4,688	SVP (BT)	\$ 2,204	\$ 1,953	\$ 1,196	\$ 5,352
Single Disc Entertainment DVD	J DVD	5,730	UNP	\$ -	\$ 4,819	\$ 2,779	\$ 7,598
Single Disc Educational DVD	A DVDED	6,731	UNP	\$ -	\$ 5,661	\$ 3,264	\$ 8,925
Nonfiction	J NF	8,267	SR (ING)	\$ 20,667	\$ -	\$ 41	\$ 20,708
Multi Disc Audiobook	A Audio	8,775	SVP (MWT)	\$ 47,824	\$ 1,903	\$ 439	\$ 50,165
Readers	E Rdr	8,888	SVP (BT)	\$ 4,178	\$ 2,817	\$ 2,711	\$ 9,706
Multi Disc Entertainment DVD	A DVD	9,526	SVP (MWT)	\$ 35,246	\$ 2,286	\$ 476	\$ 38,008
Fiction	J Fic	10,555	SVP (BT)	\$ 4,961	\$ 4,396	\$ 2,692	\$ 12,048
Music CD	A CD	10,822	SVP (MWT)	\$ 32,465	\$ 2,194	\$ 541	\$ 35,201
Fiction	E Fic	17,157	SR (ING)	\$ 42,892	\$ -	\$ 257	\$ 43,149
Single Disc Entertainment DVD	A DVD	28,615	UNP	\$ -	\$ 24,067	\$ 16,168	\$ 40,234
Fiction	A Fic	30,702	UNP	\$ 3,684	\$ 24,725	\$ 13,048	\$ 41,458
Nonfiction	A NF	38,783	SVP (BT)	\$ 18,228	\$ 16,153	\$ 9,502	\$ 43,883
		229,558		\$ 244,363	\$ 105,049	\$ 62,199	\$ 411,611

Check out 



Gathered Data

PDQ Items	
PDQ % of Collection	% of ALL PDQ Items
11%	5%

Collection
Adult DVDs

Items Received			
2016 NonPDQ	2016 PDQ	2016 SR	Grand Total
5,588	3,368	20,674	29,630

SR Items	
SR % of Collection	% of ALL SR Items
70%	55%

Average Days to Process			
Non-PDQ Median	PDQ Median	SR Median	Overall Median
5.9	4.9	0.1	1.0

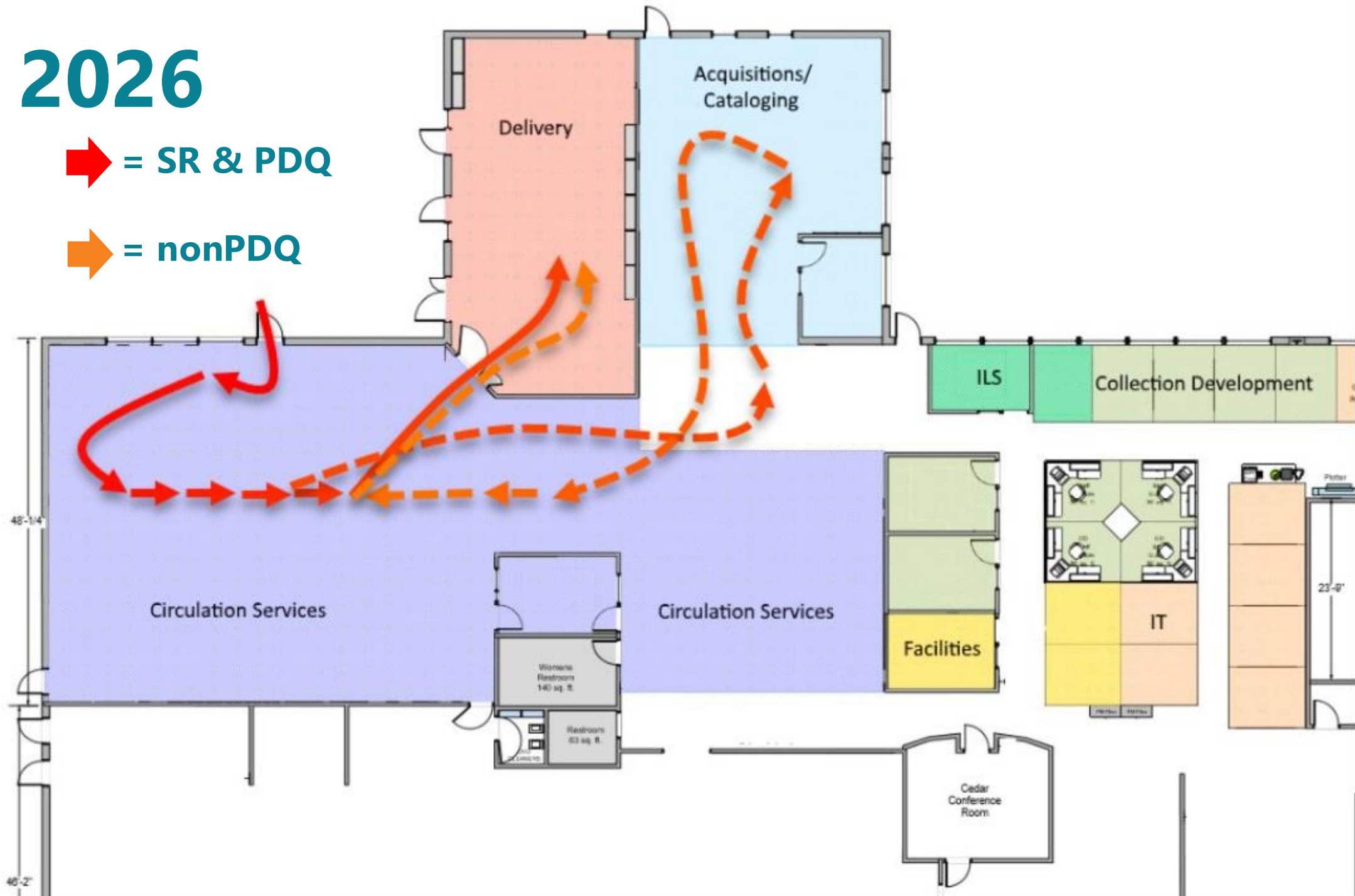
Average Days From Order to Shelf			
Non-PDQ Median`	PDQ Median`	SR Median`	Overall Median`
32.1	29.8	26.1	27.1



2026

 = SR & PDQ

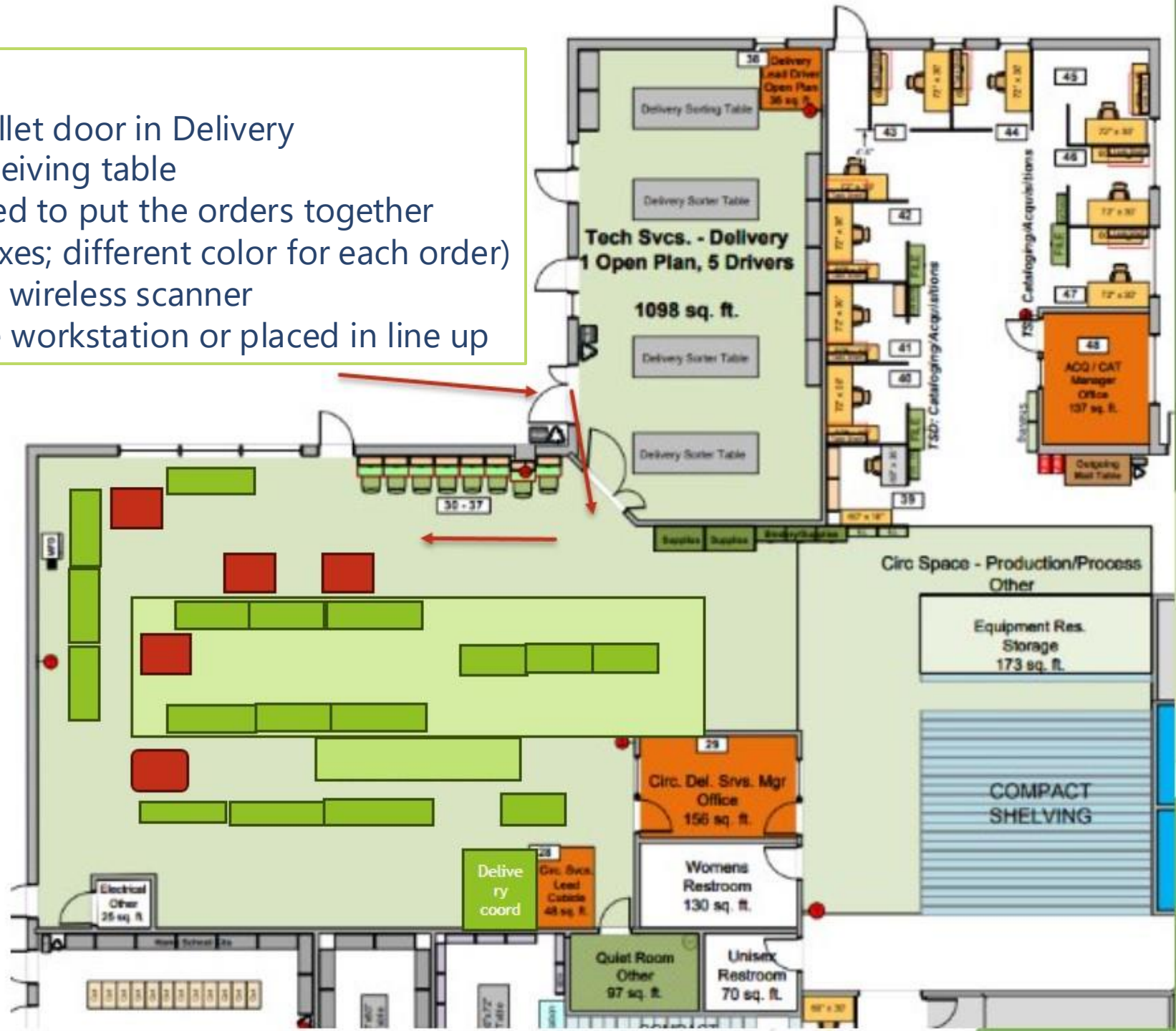
 = nonPDQ



Pallets:

- Brought through the Pallet door in Delivery
- Taken to the area by receiving table
- Colored markers are used to put the orders together (without moving the boxes; different color for each order)
- Scanned to receive with wireless scanner
- Moved to next available workstation or placed in line up

Now

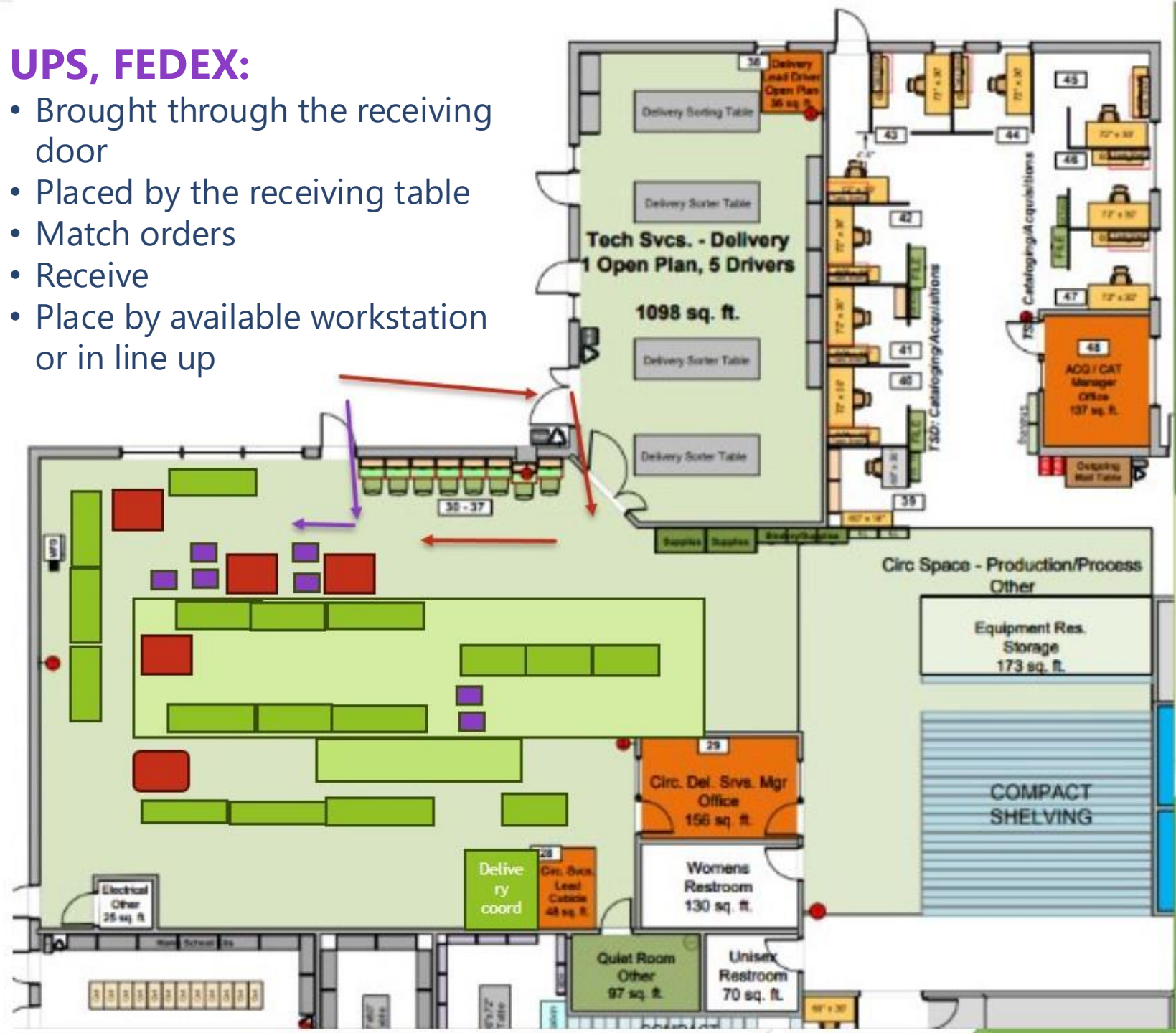


Now



UPS, FEDEX:

- Brought through the receiving door
- Placed by the receiving table
- Match orders
- Receive
- Place by available workstation or in line up



Anatomy of a Workslip

- » On-sale date
- » PO# & assigned workflow (SR, PDQ, or nonPDQ)
- » Bib control number & brief info
- » Pre-assigned call number
- » Supplier/Vendor
- » Special Notes:
 - » "NEW" designation, genre labels, specific CAT or processing instructions
- » **Circ prints workslips during unpacking and pairs them with the items**

OSD 3/21 **Shore Isle TS Processing Workslip**

Qty Recv. 5 Recv Date: 3/15/2017

PO#: P24620 Holds: 2
PDQ

Control #: 1517777

ISBN: 9781481468640 : HRD

Title: **Baseball genius**

Author: Green, Tim, 1963- author.

Call# J GREEN

Supplier: BAKER & TAYLOR EDI PDQ

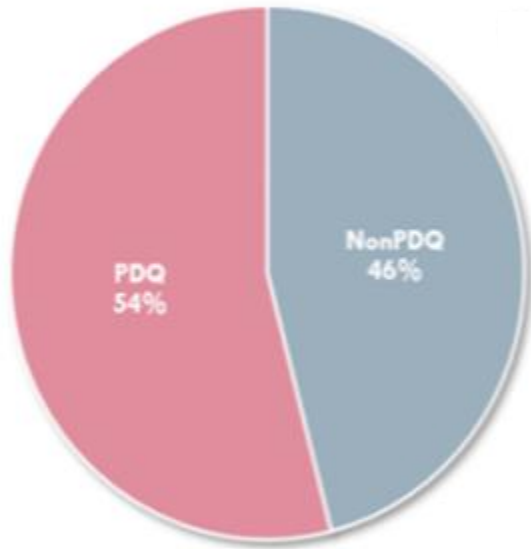
List Price: \$16.99

Inv #: 4011850874 PubYear: 2017

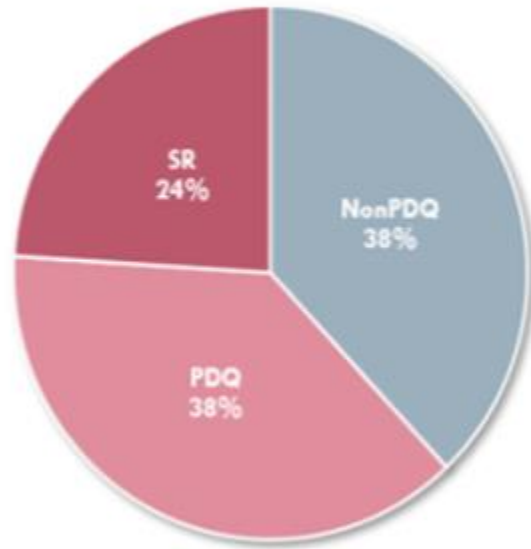
Notes:
NEW - label SPORTS

Bra	Coll	Fund	Mat	QtyRecv
SRV	J FIC	JFIC	Book	5

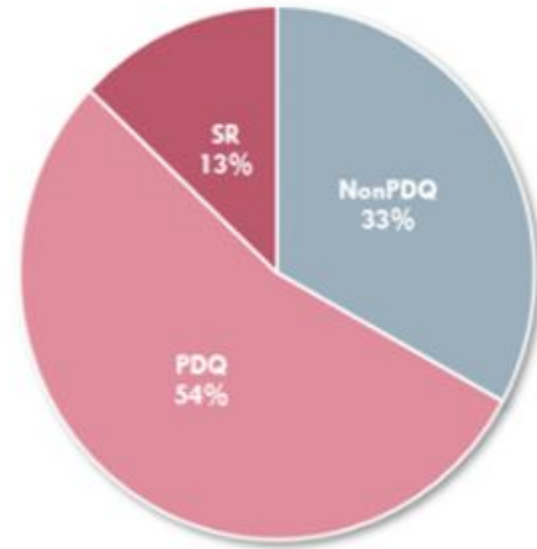
2015



2016



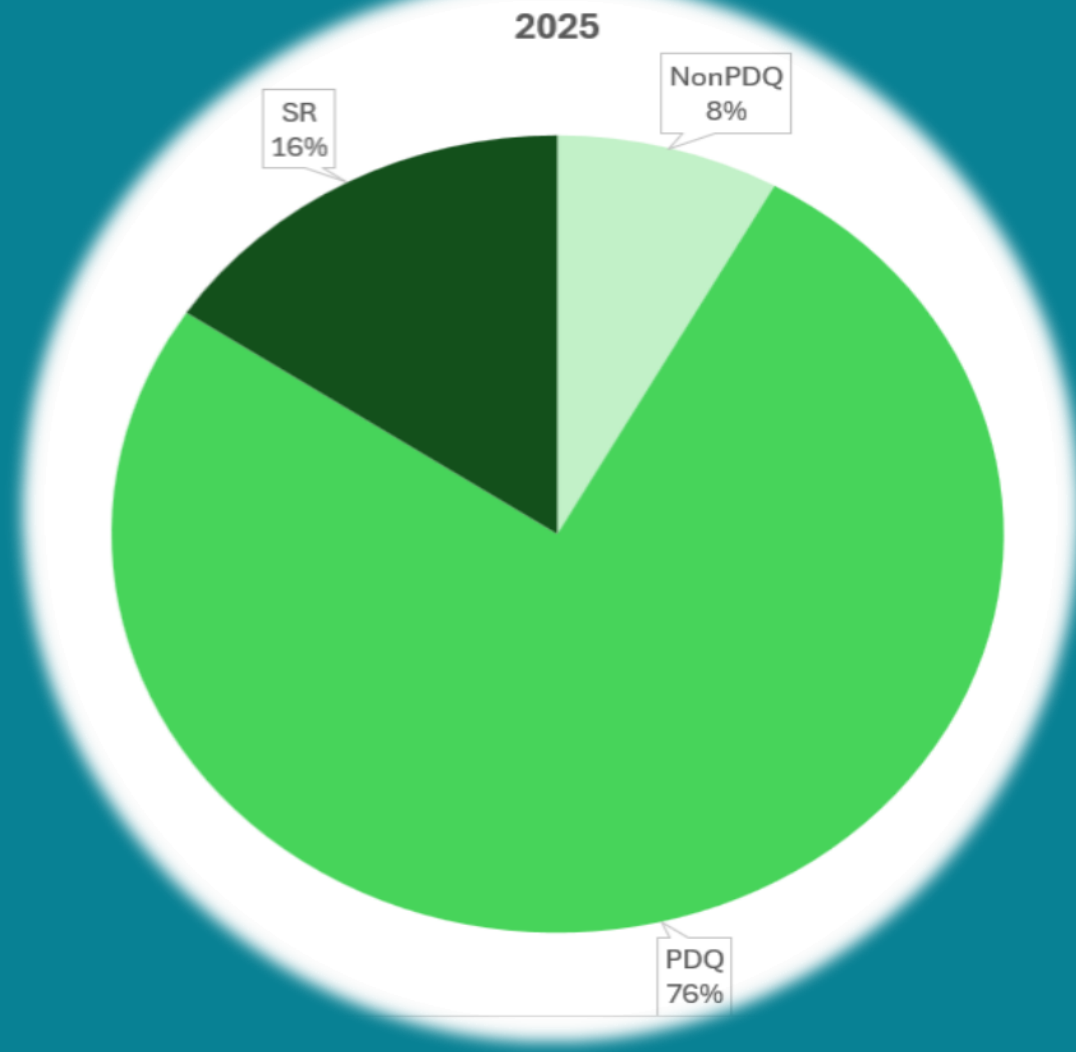
2017



Check out **possibility**



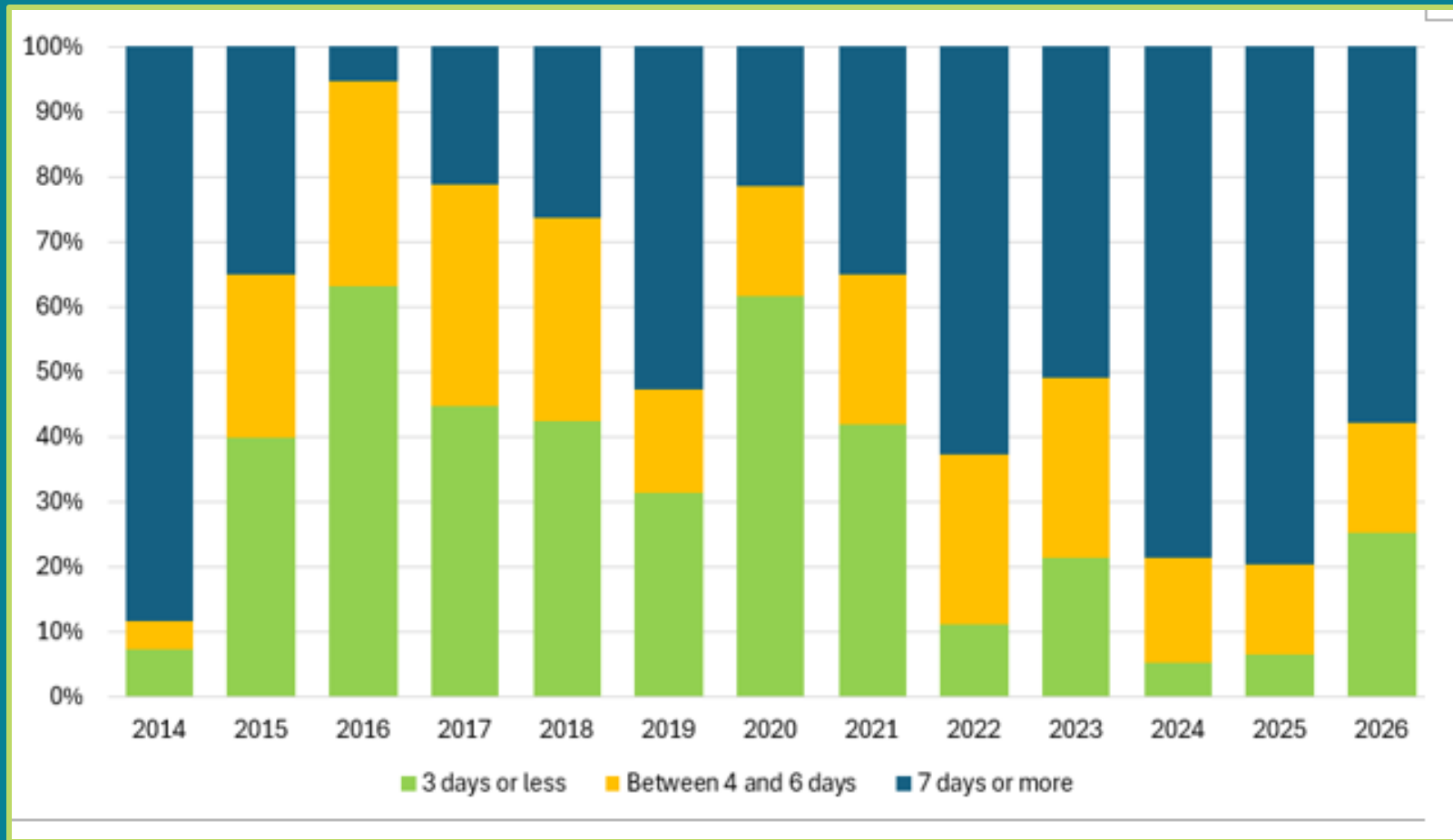
2025



Check out **possibility**



Speed Results



Check out **possibility**



Continued LEAN Process Change Examples

- » Moved empty cart corral to create space for pallets
 - » Adjusted spacing between workstations to allow end-desk processing
- » Eliminated movable shelving units originally used for separate holds and new materials
 - » Community libraries combine materials upon receipt
 - » Shifted distribution directly to the delivery room
 - » Created an open layout with clear line of sight to see workflow and task ownership
 - » Removed end-of-day bin packing and transport
- » Stopped tracking unused data to free up staff time



Challenges

- » Vendor Delays – End of & beginning of fiscal year Ingram delays
 - » Not sending the pallets timely creates backlog for first 4 months
- » Polaris ASN Upload Delays
 - » Large ASN files from the delays take days and weeks to upload – part of 4 month delay
- » Having PDQ and nonPDQ combined in shipments, vendor delay for our process



The Road to Workslip Cataloging

For over a decade, we've steadily worked to refine our Cataloging and Processing workflows, guided by our shared goals:

Reduced delays & less handling = materials getting to customers faster

A series of small, targeted efforts to reduce our backlog gradually evolved into major innovations:

- » Our PDQ workflow (*more on this in just a bit!*)
- » CAT's adoption of LEAN-informed process improvement
- » Creation of Workslip Cataloging during the COVID-19 pandemic

Check out **possibility**



The Need for Workflow Change



- » As Sno-Isle grew, so too did our volume of new materials!
- » Mountainous cataloging & processing backlog
- » Repeated handling = extra friction to already strained workflow
- » Customers often waited weeks to months for new materials

If materials were going to move faster, longstanding assumptions about how the work should flow needed to be critically examined



Launching the PDQ Workflow

- » The PDQ, or *Pretty Darn Quick*, workflow represented a radical shift in our approach
- » CAT began assigning call numbers to bib records **at the time of order** for several collections
- » Began slowly with collections that lent themselves to predictable classification
 - » All ages Fiction and select Nonfiction
- » This was a team effort!

ACQ determines PDQ-eligible titles → CAT assigns call numbers → titles ordered PDQ

Titles *without* call numbers are moved to a nonPDQ order (*traditional workflow*)

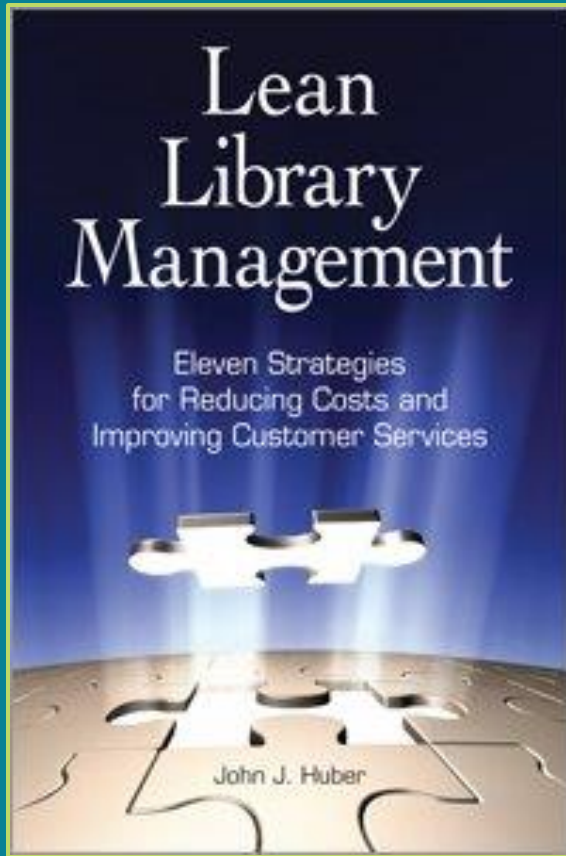


Shelf-Ready Ordering

- » Some collections had predictable call numbers *and* simple processing needs
These were upgraded to Shelf-Ready (SR)!
 - » SR arrives fully processed
 - » Spine labels, property stamps, barcodes, & more
 - » Item-level marcs contain call number & barcode-linkage for all copies
- » These improvements helped reduce the Cataloging backlog, but CAT still received one copy of each title for in-hand review
- » Additionally, many more collections were still routed through the traditional workflow, or nonPDQ. **All** copies of nonPDQ came to CAT
- » Progress was slow, but happening!



Applying a LEAN Lens



- » Progress was slowly occurring, but didn't eliminate the Cataloging bottleneck— what else should we try?
- » In 2015, Tech Services hired consultant John Huber and adopted his LEAN process-improvement framework
- » Don't work faster—work smarter
- » Staff were asked whether each step of the work adds **value** for customers, rather than delay



Applying a LEAN Lens

- » This work challenged longstanding practices that had stayed in place mostly because “that’s how it had always been done”
- » One issue became clear quickly: some collection structures made early call number assignment difficult
- » If PDQ was going to expand, collections themselves needed more consistency and predictability



Removing Barriers to Early Call Numbers

- » Needed to simplify and create consistency across collections and formats
- » Several specific changes helped remove barriers to early classification
 - » Eliminated J Series sub-collection in JFic; adjusted call numbers to standard author-based cutter, rather than series name
 - » Discontinued serial records for Travel Guides & Test Prep
 - » Reformatted our call numbers to allow Circ to print more spine labels without CAT intervention



Call Number Alert Report

- » Even with assistance from OCLC Connexion, accurately assigning pre-publication Adult Nonfiction (ANF) call numbers proved very challenging, especially for biographies!
- » So how could we push more of these through PDQ?
 - » Selectors began leaving notes for BIOs at the time of order
 - » Pre-publication ordering timeline was decreased from 6 months down to 3
- » CAT worked with IT to create the “Call Number Alert Report”, which we still use today!



Call Number Report: How it Works

- » ANF is ordered on a PDQ account, regardless of call number status
- » Weekly report identifies and aggregates on-order titles within 30 days of publication that still need a call number
- » Report creates 2 products:
 - » Polaris/Leap bibliographic record set
 - » Emailed Excel sheet of bib control numbers & ISBNs
- » Record set is used to edit individual bib records
- » Excel sheet is formatted to allow easy batch loading in Connexion for record matching
- » **This report allows our CAT team to assign call numbers to many more ANF titles, moving them into the PDQ workflow so they get to customers faster!**



Title	Author	Format	Link...	Holds	Publicat...	Call Number	Control Number	Status
Thank You, Teachers: True Stories from America's Teachers...	Patterson, James	Book	12	10	2026	371.102 PATTERS	2196848	Final
Raising Chickens for Dummies	Willis, Kimberley	Book	8	1	2026	636.5 WILLIS	2197995	Final
The New Perimenopause: An Evidence-Based Guide to Survi...	Haver, Mary Claire	Book	10	32	2026	618.175 HAVER	2198124	Final
Wired to Feel: Autism as a Condition of Sensory Surplus	Bergenfield, Sarah	Book	6	4	2026	616.8588 BERGENF	2198214	Final
Lonely Planet Austria	Walker, Kerry	Book	4	0	2026	914.3604 AUSTRIA	2198728	Final
Lonely Planet Germany	Schulte-Peevers, An...	Book	8	1	2026	914.3048 GERMANY	2198729	Final
Lonely Planet Iceland	Svala Arnarsdottir, E...	Book	10	1	2026	914.912 ICELAND	2198730	Final
Lonely Planet Journey Iceland's Ring Road	Ham, Anthony	Book	8	0	2026	914.912 ICELAND	2198731	Final
The CIA World Factbook 2026-2027	Central Intelligence A...	Book	2	2	2026	910 CIA WOR	2198747	Final
Prince Valiant: Peril of the Round Table	Newman, Paul S	Book	2	0	2026	741.5973 NEWMAN	2198761	Final
The Stimulated Mind: Future-Proof Your Brain from Dementi...	Wood, Tommy	Book	5	13	2026	616.8 WOOD	2198786	Final
Phases: A Memoir (Original)	Brandy	Book	3	5	2026	BIO BRANDY BRANDY	2198814	Final
The Science of Baking: Everything You Need to Know to Cre...	Adlard, Matt	Book	8	4	2026	641.815 ADLARD	2199662	Final
Spinoza, Atheist	Nadler, Steven	Book	2	2	2026	199.492 NADLER	2199668	Final
Around the Table: Tables and Traditions for Gathering	McGee, Shea	Book	8	6	2026	641.568 MCGEE	2199702	Final
Eating at Home: The Nourishing Practice of Everyday Cooki...	Mouzon Wofford, Tri...	Book	6	1	2026	641.5 WOFFORD	2199708	Final

Call Number Alert Report for 3/23/2026

1	BibRecID	ISBN
3	2196705	9780241788950
4	2196705	9780241788950
5	2196848	9780316569446
6	2196960	9781394401871
7	2197134	9781680517637
8	2197570	9781476739250
9	2197995	9781394402144
10	2198031	9781636142777
11	2198038	9781680517255
12	2198094	9780385548533
13	2198095	9781324051350

Expanding the PDQ Workflow

- » SR & PDQ were running smoothly! What other collections could we convert from nonPDQ??
- » Graphic Novels, Easy Readers, and Large Print began going PDQ
- » However, multipart media was a big challenge
 - » An old rule specified that staff must **not** count any “bonus” materials in the total number of parts for an item. Very confusing for staff and customers, since the green sticker never quite matched the *actual* total count
 - » Abolishing this rule, and counting *all* parts, allowed most DVDs, audiobooks, and music CDs to go PDQ!
 - » *(Bonus: we got rid of the green stickers!)*



Check out [possibility](#)



Managing Added Copies

- » SR & PDQ were working, but some congestion still lingered
- » Single copies of each replacement or purchase alert title were sent to CAT for review, even if matching bib existed in catalog
- » Tested the “Embedded Cataloger” approach: a Cataloger worked amongst Circ to review added copies in real time ahead of processing
 - » Model failed due to the bustling Circ environment and the constant interruption of ADDs to check
- » Instead, ACQ recorded an “ADD” note in order lines, which carried over to the printed workslips during the receiving process
- » Upon seeing ADD note, Circ verified incoming materials against existing bib record and edited accordingly
(ex: added paperback ISBN to hardback record; all copies could bypass CAT)

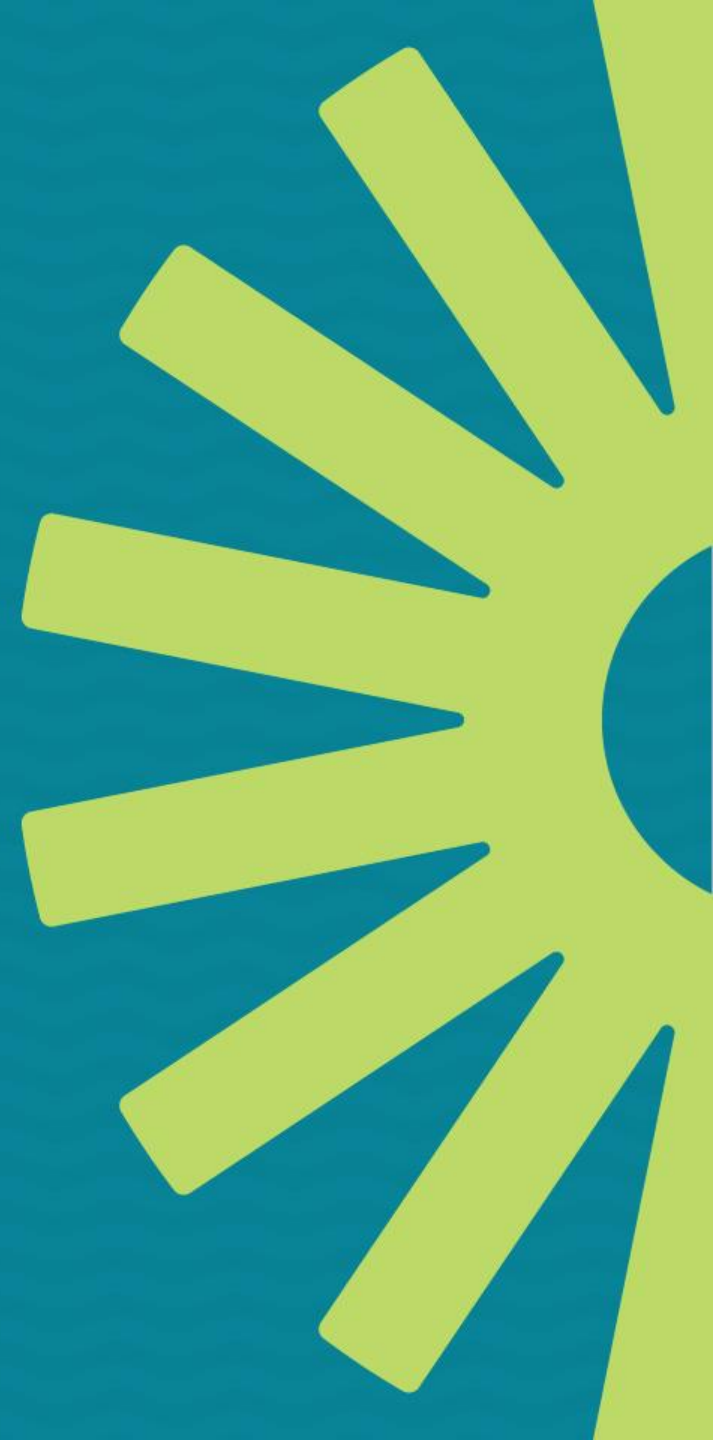


Testing WorldShare for Faster Cataloging

- » Pilot from March 2019-July 2020 with the goal of utilizing WorldShare Collection Manager's automated processes to reduce number of single-copy PDQ items & workslips reviewed by CAT. *Could CAT catalog with no items in-hand?*
- » Yes!—but the process proved very inefficient and clunky
- » Separate workflow from existing SR & PDQ; prioritized fiction ahead of all other materials
- » Editing in Polaris was slow, and Connexion was still needed for authorities and WebDewey
- » Mismatch or poor quality of some WSCM records created additional work
- » Pilot proved that Cataloging was faster and more reliable in Connexion—the tool catalogers already used for all other collections



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=245 10\$aSilent as the grave /\$cby Zoe Arsen.
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=338 \\\$avolume\$bnc\$2rdacarrier
=490 0\\\$a[Light as a feather ;\$v3]
=490 0\\\$a[Weeping Willow High School ;\$vbook 3]
=520 \\\$a" McKenna has managed to rid Violet of the curse claim
town. McKenna's friend Mischa now carries the curse, and wher
responsible for their deaths...including McKenna and everyone
=650 \\7\$aJUVENILE FICTION / General.\$2bisacsh
=776 08\$iOnline version:\$aArsen, Zoe.\$tSilent as the grave\$
9781534444355\$w(DLC) 2020020699



Birth of Workslip Cataloging

- » Limitations of the pilot became more pronounced in early 2020 when the COVID-19 pandemic forced CAT to abruptly pivot to remote work
- » Without copies in hand, CAT realized they must rely on the workslip details to catalog materials from afar
- » Pairing Connexion with workslips made perfect sense, and thus Workslip Cataloging was born!
- » This important discovery led to the end of the WSCM pilot and the revolution of the SR & PDQ workflows– the very same we still use today
- » For nonPDQ items, CAT devised a rotating schedule of in-person workdays to ensure social distancing while still processing items in a timely manner



OSD 3/21

Sno Isle TS Processing Workslip

Qty Recv: 5 Recv Date: 3/15/2017

PO#: P24620 Holds: 2

PDQ

Control #: 1517777

ISBN: 9781481468640 : HRD

Title: **Baseball genius**

Author: Green, Tim, 1963- author.

Call# J GREEN

Supplier: BAKER & TAYLOR EDI PDQ

List Price: \$16.99

Inv #: 4011850874 PubYear: 2017

Notes:
NEW - label SPORTS

Bra	Coll	Fund	Mat	QtyRecv
SRV	J FIC	JFIC	Book	5

Why Workslip Cataloging Works

- » Separates physical handling from CAT work while still maintaining accuracy and consistency; Workslips provide the local information CAT relies on, so they can catalog confidently *without* items in-hand
- » CAT typically works 4-8 weeks behind arrivals, allowing time for OCLC record upgrades
- » On-order records allow titles to be visible and holdable for customers almost immediately while the bibs await enhancement
- » Supports remote/hybrid work and boosts staff morale, while clearly identifying items needing further review
- » Errors and adjustments are surprisingly minimal; this work, along with nonPDQ material, is handled during in-person workdays



Why Workslip Cataloging Works

- » Workslip Cataloging reduces unnecessary handling, takes advantage of stronger records over time, and keeps the work steady & sustainable while providing timely access for patrons
- » As a public library system, Sno-Isle Libraries prioritizes clear, consistent records that support discovery and access, rather than the depth or customization required in academic collections. Our workslip practice reflects these priorities
- » Today, Workslip Cataloging is not a workaround, it's the norm

We quickly and efficiently get materials into the hands of our customers, where it belongs!





2015



2026



LEANing Acquisitions & Collection Development

- » LEAN had been very Circulation & Processing focused, with Cataloging adjusting along the way
- » But what about the *beginning* of the workflow—materials purchasing?

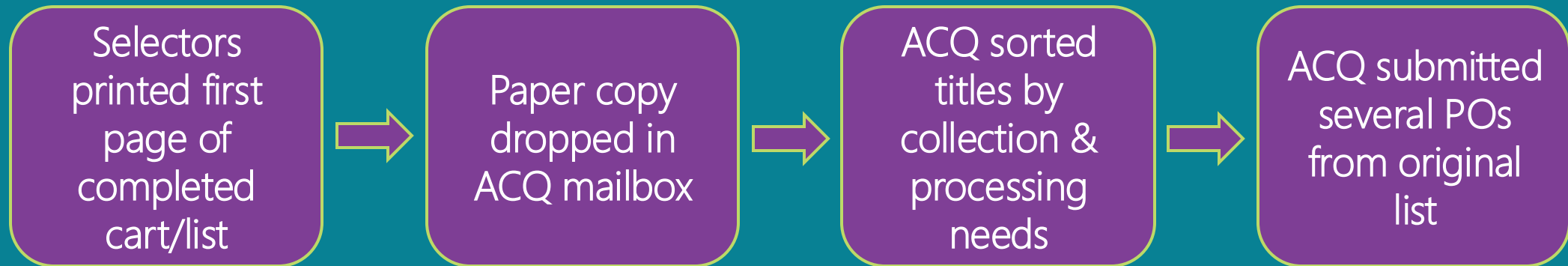


- » What lessons and strategies could be gleaned from Circ & CAT's experience to apply to the rest of Collection Services' work?



Acquisitions Backlog

- » Though Circ had been LEANed, ACQ was still running about 1 month behind Selectors in submitting orders
- » Very intensive ACQ process before orders could be submitted, which created large peaks and valleys of deliveries for Circ & CAT
- » **Original order flow:**



Intensive Acquisitions Process

- » Sorted Selectors' lists for processing & cataloging needs
 - » Printed copies of full lists with lots of highlighter color-coding!
 - » NEW & ADDs were often mixed in with other titles
 - » SR, PDQ, & nonPDQ flows meant separate POs for each flow
- » Determined which vendor to order from
 - » Were splitting equally between Baker & Taylor and Ingram at the time
- » Completed weekly Purchase Alert Report
- » Reviewed approved Customer Suggestions to place individual customer holds at time of order



Let's Get Movin'!

- » New Assistant Director of Collection Services joined the team in 2019 and quickly spotted remaining gaps in the LEAN workflow
- » Plans were formed to clear the ACQ bottleneck
- » Small, but immediately impactful changes:
 - » Reduced pre-pub ordering from 6 months down to 3
 - » Labor-intensive to deal with frequent publisher delays, resulting vendor cancellations, and re-orders
 - » Holds queues were lengthy, and this helped decrease them dramatically
 - » Improved accuracy of on-order items in the catalog
 - » Reduced Selector list size to 40 titles max each (*previously no limit*)



Vendor & Service Evaluation

- » 2019 - Awarded primary vendor contract to Baker & Taylor via RFP
 - » Removed obligation of ACQ to evenly split orders between major vendors
- » Enabled EDI with many vendors; later, added ASN receiving with Ingram & Midwest Tape, and palletized deliveries with Ingram
- » 2020 - Migrated customer purchase suggestions from a homegrown platform to *BiblioSuggest*, locally branded as "Suggest a Purchase"
- » Introduced the *Author Alerts* service in tandem with *Suggest a Purchase*
 - » *Author Alerts* allowed customers to sign up to receive notifications as their favorite authors, musicians, or actors hit our catalog, prompting them to place their own holds
- » These changes freed precious time for our ACQ staff to focus on their primary duty— acquiring new materials for the library



LEANing Collection Development

- » Collection Development kicks off the entire process!
 - » CD Librarians have an immense responsibility to the rest of the workflow
 - » The size, pace, and timing of their work impacts everyone down the line
- » Created annual budget allocations and monthly spending targets for all selection areas
 - » Monthly spending targets helped smooth the peaks and valleys, and spread the work more evenly across the fiscal year
 - » CD continues to take an active role in determining how the annual materials budget will be allocated in alignment with and informed by circulation data and customer needs



LEANing Collection Development

- » Selectors began sorting their own carts before submitting to ACQ for ordering
- » Developed Ordering Schedule
 - » Different collections and formats are ordered on specific days of the week to help pace the work and ensure new materials are always flowing
- » Created shared Tracking spreadsheets
 - » Selectors enter ready-to-order lists onto the "Order Tracker" for ACQ
 - » ACQ then creates POs in Polaris for each list and enters the PO number(s) onto the "099 Tracker" for CAT to preassign call numbers for PDQ & SR materials
 - » These shared trackers transformed a paper- and email-heavy process to a seamless, digital one, reducing lag time between each work group



Order & 099 Trackers

ACQ now boasts a same-day turn-around on almost every order!

Date Submitted to ACQ	Order Name	Vendor	CD initials	List Price	ACQ initials	Order Date	Days Elapsed	Notes
4/6/26	sel kp 4/6/26 AFIC PRIORITY HPA	ing	kp	\$2,546.67	KS	4/6/26	0	
4/6/26	sel kp 4/6/26 ALGO PRIORITY HPA	ING	kp	\$973.91	KS	4/6/26	0	
4/6/26	Sel lb 04/06/26 HPA Easy ADD	ing	lb	\$199.90	JN	4/6/26	0	
4/6/26	Sel lb 04/06/26 HPA J Fic ADD	ing	lb	\$204.85	JN	4/6/26	0	
4/6/26	sel bks 04/06/26 T Fic ADD	ing	bks	\$202.69	KS	4/6/26	0	
4/6/26	sel bks 04/06/26 T Fic NEW	ing	bks	\$534.82	KS	4/6/26	0	

DATE	099 Request	Number of titles	ACQ staff	ACQ comments	CAT staff	CAT Complete/Notes
4/7/26	P62150 Easy add	2	JN		ZL	X
4/7/26	P62151 Reader add	1	km		ZL	X
4/7/26	P62152 JGNVL new	3	km		ZL	X, skipped 1, one is an Easy



PDQ Chart

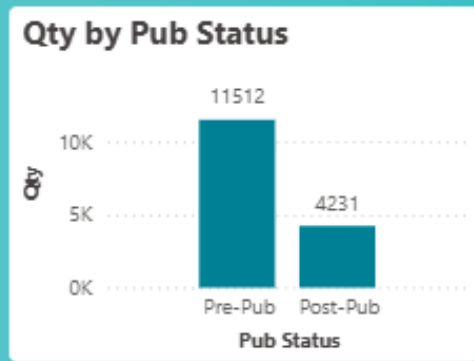
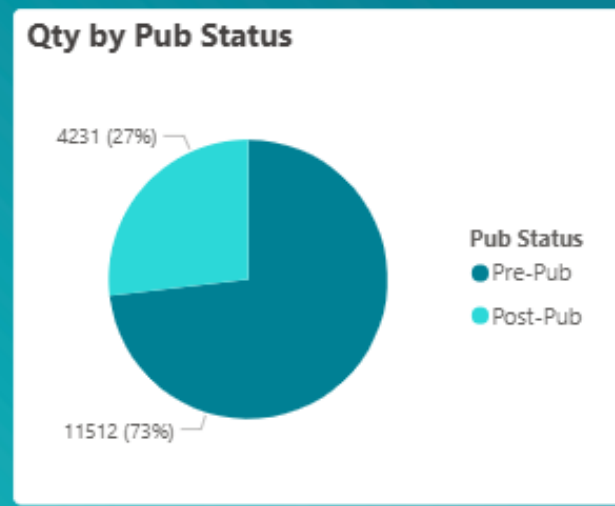
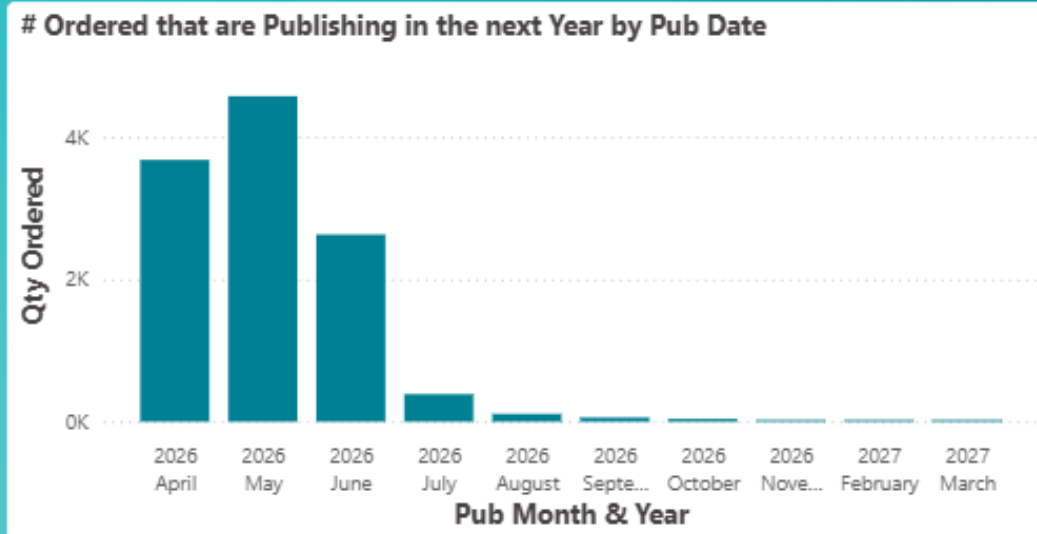
- » Asst. Director worked with Collection Services staff to thoroughly articulate and document the new SR, PDQ, & nonPDQ workflows

Collection	Category	Acquisitions Notes
Audiobooks - All ages - Great Courses - Both New & Added copies	PDQ	Non-processed. Great Courses always include booklets. Circ kn spine label. They can be ordered PDQ.
Audiobooks - All ages - Single & Multiple Disc - Both New & Added copies	PDQ	Vendor processed. Different reader cannot be an ADD.
Audiobooks - Book + CD EASY, ENF, E BIO	PDQ	Vendor Processed. Put "book+cd" in POLI note for CAT. Check fo have specific supplier account for book+cd.
Board Books (including Childcare BB) All World Language BB should be Non-PDQ and will be treated as BB's, not in WL Easy collection.	PDQ	See separate instructions for Board Book orders. \windows Services\Cross Dept Processes\Board Books & Teen Paper
Book Discussion Kits	Non-PDQ	See separate instructions for Book Discussion Kit orders.
CDs (Music) - Juvenile - Multiple Disc - Both New & Added copies	Non-PDQ	Non-processed
CDs (Music) - Juvenile - Single Disc - Added copies	PDQ	Vendor Processed
CDs (Music) - Juvenile - Single Disc - New to system	Non-PDQ	Vendor Processed



Anticipating Deliveries & Publishing Cycle Fluctuations

Collection Services Orders Pipeline



Vendor	Qty	Total Disc Amt
Ingram	14,748	\$185,987.37
MWT	995	\$21,616.2
Total	15,743	\$207,603.57

Status	Qty	Total Disc Amt
Backordered	12,062	\$159,346.84
Committed	268	\$2,912.25
Ordered	3,413	\$45,344.48
Total	15,743	\$207,603.57

Circ ↔ ACQ Improvements

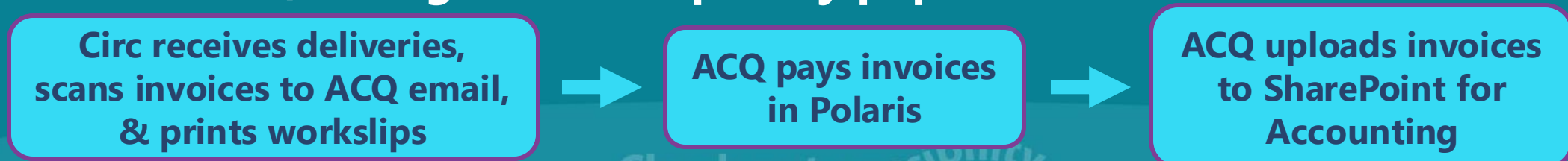
» 2019 & Before:



» Enter COVID-19: Pivot to remote and (semi-) paperless invoice flow:



» Current, with goal of completely paperless:



Change is Hard! Talk it Out!

- » Addressed and discussed long-held perspectives and attitudes about the work
- » Defined staff roles and set clear boundaries
 - » Who should be doing what? Reviewed job descriptions with staff and realigned the work accordingly
 - » Gathered staff input: What will make your work easier or better? How can your colleagues help you?
 - » Each staff group deserves to be able to work efficiently and have a good experience. Work should *not* be grueling!
- » Important to validate staff's past experiences so you can move forward and create positive, lasting change together!



CPI: Recent Developments

- » Sunsetting waning collections and leaning into our ILL service:
 - » Teen Classics, Music CDs, & CD Audiobooks
- » Replaced “year” on spine label with small, removable purple dot to denote “NEW” materials for Community Libraries
- » Board books, Teen Paperbacks, & Magazines now use the same barcodes as most other collections; will remove “year” from barcodes in the future
- » Set noon deadline for Order Tracker & further reduced max list size to 30
- » Migrated OverDrive and Hoopla marc records to *BiblioCloudRecords*

Again, small but impactful changes can help streamline the workflow so staff can focus on more important and complex work



Sending More Collections PDQ & SR

» 2025:

- » Converted Romance and Western to official collections
 - » Adult Fiction is now SR!
 - » Spanish print materials are mostly PDQ

» 2026:

- » Developed J Nonfiction call number report
 - » Mirrors current ANF report
 - » Allows more titles to go PDQ, rather than only SR or nonPDQ

» Future:

- » Graphic Novels & Teen Fiction could go SR
- » Large Print Fic and J Fic could go SR, once interest labels are dropped or official collections are created



We wouldn't be where we are without our awesome colleagues!



[Photo Credit](#)

Special Thanks to:

Circulation & Delivery Services

**Collection Services: Collection Development,
Cataloging, Acquisitions, & Interlibrary Loan**

Finance and Contracts & Procurement

Information Technology

And an EXTRA Special Thanks to these folks for providing additional details via interviews and Teams chats!

Jessica Russell, Jodi Nichols, Karen Maland,

Kerry Spaulding, & more, we're sure!

Check out *possibility*



Thank YOU, Our Audience!

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»» Valerie Rollins – VRollins@Sno-Isle.org



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