

# Shelving Needs Assessment:

7 Questions to Ask Before Buying a Shelving System



Purchasing a shelving system for your file folders and other media can be a challenging task. There are many different kinds of shelving – such as fixed, mobile and four-post shelving – and for each type there are a range of styles and options to choose from.

The secret to getting the best solution is to start with a clear understanding of your needs. With that information in hand, it is much easier to weigh the various shelving options and select the best solution.

This needs assessment outlines the seven essential questions you need to ask before shopping for a shelving system. Answering the questions in this guide will give you a clearer idea of what kind of shelving to look for. It will also ensure you don't forget any factors that are important to your business.

## 1. What are we storing, and what are we not storing?

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- To answer this question, take a thorough inventory of the quantity and types of media you plan to store. Understanding the kinds of items you will be storing is particularly important. Some types of shelving are better suited for file folders, whereas others (such as four-post shelving), are flexible enough to accommodate mixed media, banker's boxes, and other kinds of stored objects.
- Another important part of the inventory is to identify what you won't be storing. Installing a new shelving system provides the perfect opportunity to purge your collection of unneeded items such as duplicates and non-records that take up extra storage space.

- You can also take advantage of the opportunity to identify any non-standard folders in your collection, and convert them to a standard, uniform format. This can lead to huge space savings within your shelving system. For example, if some of your records are stored in top-tab, expandable pocket-style folders, you would need to allow quite a bit of vertical access space between all of your shelves. Converting these folders to standard side-tab folders allows you to reduce the vertical space between shelves and fit many more files into your shelving system.

## 2. How much growth do we expect in our storage needs?

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- The amount of expected growth will influence your shelving system in a number of ways.
- First, it will impact how much free space to leave when initially loading the shelves, and therefore the quantity of shelving you install. If you expect quite a bit of growth, it may make sense to leave 25 percent of each shelf unused to accommodate the eventual growth.
- Secondly, the amount of future growth may influence your filing practices and therefore the way you organize the shelving system. One thing to look at is whether the growth is expected to consist of net-new files, the growth of existing files, or a bit of both. For example, if you expect to add many net-new files, you may want to adopt the practice of terminal-digit filing (TDF). With TDF, new files are added to different areas within your storage space depending

on the final digit in the file number. Separating new files into different areas avoids physical bottlenecks, and allows many different staff to work on new files at the same time. However, something to keep in mind is that with single-digit TDF, you need to have exactly ten areas within the shelving system where workers can add new files. If this needs to happen simultaneously, then you will probably need to have ten "always open" areas of shelving. This is especially important to keep in mind if you are considering a mobile shelving system.

- If you do opt to go with a mobile shelving system, you can always install extra tracks for the shelves to slide along. Then, when your storage requirements grow, you can simply add another mobile shelving carriage without having to first add the track

### 3. How much space do we have to work with?

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- To properly plan a shelving installation, you need to know how much space you have to work with, both now and in future.
- For example, if you are expecting file volumes to grow, and you have a limited amount of space to work with, you may need to select a high-density mobile shelving system. This will give you the greatest capacity for future growth, while staying within your limited space.
- On the other hand, if you are expecting growth and have a lot of space available, you could opt for a fixed shelving system. Fixed shelving could take up more space, but would usually be more affordable.

### 4. What are our workflow and accessibility requirements?

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- The way that workers interact with your files is a critical factor in your purchase of a shelving system.
- If your files are accessed frequently, and speed of access is important, then an open, fixed shelving system may be the best option. Open, fixed shelving keeps all of your files visible and not hidden behind other shelves. On the other hand, if you access your files less often, you might consider a mobile shelving system, which maximizes your storage space.
- Another workflow consideration is how many workers require access to the files. If many workers need access at any given time, you will need to allow multiple aisles between shelving units. As a rule of thumb, you should aim to have one open aisle for every worker accessing the shelves simultaneously, on average.



## 5. What are our compliance requirements?

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- To ensure the safe, compliant operation of your shelving system, you need to ensure that it meets all local building codes. This will require you to stay within weight-load restrictions for the type and composition of the floor in your building.
- Accessibility is another important area of compliance. For example, to accommodate workers in wheelchairs, you may be required to establish a certain minimum clearance between shelves or carriages.
- Worker comfort and safety are also factors in the height and depth of the shelving system. Items can't be placed too high, especially heavier items, nor can shelves be so deep that they make it difficult for workers to retrieve items

## 6. What are our security requirements?

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- Shelving units offer many different ways to secure valuable or sensitive information.
- When it comes to security, the more you know about the individual security requirements for collections and sub-collections, the better.
- Depending on the collection and the situation, you may need to implement the following security options:
  - securing entire rooms, or sections within a room
  - securing individual aisles or shelving carriages
  - securing individual shelves or sections on a shelf
- This allows you to establish access levels depending on the sensitivity of the files, and the authority of the user.

## 7. How important are aesthetics?

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- Finally, you need to think about how important aesthetics are to your particular application.
- If your shelving system is within view of customers or clients – for example, with many doctors' offices



and clinics – the appearance of your shelving can be a pretty important factor to consider. If the shelving has a modern look, and is tidy and well organized, it will leave customers with a positive impression of your organization and provide assurance that the information you hold is in good hands.

- To enhance the look of your shelving system, some shelving providers offer customizable textures and colors to match your décor.
- To further improve the look of your shelving you can also install rolling doors to cover the files and provide a more uniform look to your filing area.

As these questions have shown, there is a lot to think about before purchasing a shelving system. However, a lot is riding on your decision, so the research and thought you put into it will pay dividends. **Getting it right means greater productivity, lower overhead costs and increased security and compliance.**

