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Moving a Library Can Be Easy, but Planning and Project Management Is Key

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Abstract

In the summer of 2007, the University of Tennessee at Chattanooga (UTC) received 48 million dollars to plan and build a new library. Planning for the moving of the collection began shortly thereafter. This paper details specific collections projects completed by UTC Library faculty and staff that resulted in a flawless move that took only 11 days to complete. The luxury of time to complete a collection inventory and accurate measurement was key, but so was selecting the right people for the project.

Moving an entire library collection to a new facility doesn't happen very often, and I would dare say that many librarians will never experience the utter stress and joy involved in such a huge endeavor. That said, whether you are moving your collection within your existing facility or to a completely new space—there are two ingredients that will help make the move much smoother: planning and a sense of humor! Without proper planning and coordination, a library move can be a disaster leaving you with collections in a mess and items not being available to your patrons. Proper planning and coordination allow for a smooth and “easy” move with little downtime and an orderly and available collection quickly. This paper will discuss how the UTC library staff successfully moved the Library's collection from one building to a brand new facility with little mistakes. Focus will be placed on important points to consider to ensure success in your library move. Oh, and a sense of humor—that will get you through all the rough patches because there will be rough patches!

In the summer of 2007, the University of Tennessee at Chattanooga (UTC) received 48 million dollars to plan and build a new library. The library and the entire UTC campus was thrilled, and a bit scared. This was a huge undertaking. At the time of funding, no building design or programming plans had been discussed. One thing was certain: the move was going to be a monumental undertaking, and as all good academic institutions do, committees were immediately put in place to begin planning the new building and the move in earnest.

The library put together a committee named the Internal Library Building Committee. This committee was focused on all aspects of planning associated with the move to the new library. This included not only the physical move of the collection, but the programming and design of the building. As specific projects came up, and as the library moved closer to the actual move, a separate team led by staff members from the materials processing department with members from library IT, special collections, and library administration was formed to plan and work through the minute details associated with moving the physical collections. This team was small and agile, which allowed the group to communicate effectively and switch gears mid-project based on data and findings as work was completed. The team met weekly or more if needed and worked off of project plans and action items assigned to individual members. One project manager made sure that all projects running in parallel were being completed and any issues needing follow-up or discussion were tracked. Most importantly, having a member of library administration on the team allowed for finite decisions to be made. This allowed projects to move more quickly because decisions did not have to be funneled up the chain of command.

Because the new facility was not designed and the physical move was years in the future, the library had the luxury of time to plan and coordinate efforts surrounding the move of the physical collection. That said, without floor plans, shelving selections, and building programming, planning for the exact move of the collection was going to

be an ever-changing and fluid process. The one thing that could be accomplished without knowledge of building specifications was one of the major pillars of any successful move and can be summarized in one phrase: “get to know your collection.”

With a move looming in the future, it became imperative to begin accounting for the collections currently housed within the Lupton Library. It quickly became clear that the library’s collection had not been reviewed since it was moved into the current facility 35 years earlier, and it is possible that it had never been adequately reviewed and weeded. With this in mind, the first project related to the move was a review and inventory of the entire collection. A collection review and weeding project is not something to undertake without caution, especially at an academic institution where such a review has never occurred. Faculty needs and concerns were of the utmost importance and the collection review was open and transparent, and involved faculty at every step. The review involved library liaisons reviewing the collection by call number in four phases. Each phase focused on a different subject area, and all recommendations for discard were posted for faculty review and comment at the end of each review cycle. The overarching goal of the review was “a balanced collection that provides appropriate coverage on a topic, while preserving Intellectual Freedom in a constantly changing society” (Wikipedia). The review began in the fall of 2010 and was completed in spring 2012.

An inventory of items was pulled from the library’s ILS, and each item was given a measurement of 1.25 inches. A size estimate was given so that the committee could determine current collection size and estimate size following discarding. In order for the review to be accurate and complete, another large project needed to be completed—barcoding bound serials. Bound serials were non-circulating at the time of the review, but in order to properly inventory and estimate size of the collection, all bound serials had to be barcoded. The materials processing

department, along with a select group of volunteer librarians, worked tirelessly to barcode all bound serials prior to the collection review beginning.

During the review, it was estimated that up to 25% of the collection would be effectively weeded. This was based on an initial review of the collection based on circulation statistics, age of content, and first review by subject liaisons. This number was used in initial design and programming of the new building, which was happening in parallel with the collection review process. The first plans had collections filling both the ground floor and the third floor with discrete collections like reference and popular materials living in small footprints on other floors of the now five-story building. Because it was estimated that up to ¼ of the current collection could be weeded, the internal library building committee began looking at ways to compress the collection into one floor.

A decision to utilize compact shelving on the ground floor to house monographs, serials, documentary film, microfilm, microfiche, and oversized collections was made. This freed up space on the third floor for more group study rooms and shared university space, but created a more complicated move of the collection due to the interfiling that would need to occur in order to house various collections on one floor. Soon after the decision to use compact shelving was made, specific shelving units and shelf sizes and configurations were also selected. This forced those planning the collection move to make some mapping decisions related to the collection before the collection review and inventory process completed. It would have been better to complete the inventory and weeding process before making these decisions to ensure that the collection, after weeding, would actually fit appropriately within the selected configuration. But, as with any building/construction project, this is not always possible and those on the move committee had to become flexible and creative in approaches to solving problems that these early decisions created later in the process.

It should be noted here that one decision in particular had a larger impact later in the project than the main decision to use compact shelving.

This was the decision to house call numbers M and N on oversized shelving carriages. These call number ranges house a large collection of musical scores and art books that are often oversized. When this decision was made, it meant that the collection had to be considered in two distinct sections: A–L and P–Z, because everything pivoted around the larger carriages in M and N. Since the majority of our expected future growth and the majority of our bound journal collections live in P–Z, it meant that if weeding predictions from the review project did not meet projections as expected, then that section of the collection was not going to fit.

After the first initial review was completed and lists of suggested discards were provided to faculty, it became clear that faculty were not comfortable with the amount of discarding that was suggested by librarians. Thus, far less than the 25% of items ended up being removed from the collection. This meant that there would be significant issues with overcrowding in section P–Z. Although it was a fact that weeding projections did not match with weeding reality, it often was forgotten when architects, planners, and others began making change suggestions on the ground floor. It also became problematic as the compact and fixed shelving was actually being installed because some shelving that was originally intended to be double-sided ended up being fixed one-sided shelving at the end of a section or against a wall. Support COLUMN placement also ended up consuming whole columns of shelving. All of these design decisions and construction obstacles ate away at precious square footage. Take this as a cautionary tale—always underestimate weeding and overestimate space needs, because changes in design, construction issues out of your control and underestimations of collection size can have huge impacts on your moving plans and leave you scrambling in the last few months.

At this point, the collection projects paused so that the library could do two things to transition from Innovative's VTLs to OCLC's WorldShare Management Service (WMS) and crunch numbers related to the collection review and weeding process. This is important to note because it took quite a bit of time to transition the catalog, and during this time we did not want to move too many things around in the building because we wanted to keep our data stable for the bulk load of data to the new system. It also took a bit of time to get accurate numbers from the collection review and weeding. Once we were back up and running in the fall of 2012, we began our final planning for the move of the collection that was slated to occur in the spring of 2014.

It became clear after completing the collection review and rerunning the numbers that more precise measurements of the collection were necessary to make an accurate plan for consolidating and moving the collection to one floor. At this point, all small discreet collections were physically measured. This included, CD's, LP's, Microfiche, Microfilm, Microcards, textbooks, and children's books. The reference collection and general collection (monographs and bound serials) were measured and inventoried in a more systematic way. Student workers—armed with wireless barcode scanners, laptop computers, tape measures, and spreadsheets—stored and shared via dropbox and scanned the barcode of the first and last book on each shelf. They also took the total measurement of books on the shelf (not each individual book, but the total amount of space taken up by the books on the shelf). As the students completed inventorying and measuring sections of the collection, librarians were able to review the data and compare it against the inventory of the collection from our WMS system. Not only did this process provide us with a much more accurate measurement of our actual collection, but mistakes in shelving, shifting, and barcoding were uncovered and corrected. If you have time to perform an inventory and accurate measurement

of your collection in a systematic way, it is well worth it. It allows you to accurately pinpoint problems to specific call number areas. This is really important if you are planning on interfiling any collections.

Occurring in parallel with the inventory process, student workers were also looking for and pulling all items that would be considered oversized by the new shelving standards. Students used cardboard templates cut to the size of the largest “regularly-sized” book. When they came across items that were possibly oversized, they compared those items to the template and pulled any items that were bigger than the template. This pull was important because with compact shelving, oversized items could not be placed on their sides and still allow the compact shelving to close completely. All oversized items were checked a second time by members of the materials processing department and shelved in two locations in the current library building. These two locations would then be consolidated into a single oversized section on the ground floor of the new library. The only problem that we ran into with oversized was not having an actual floor sample of the shelving provided until late in the process. Once we had the shelving unit, we could mock up our planned shelf sizes to make sure that items fit as expected and that our shelving plans would work appropriately. I would suggest getting a sample shelving unit as early in the project as possible to avoid any issues with shelf size or configuration.

Reports generated from the inventory and measuring project that ended in fall 2013 provided much more accurate data related to the size of the collection. Armed with this data, we crunched numbers and combined total measurements and item counts from disparate collections in order to get accurate mapping of the collection within the new shelving schema. Once all collections had been combined into a single shelving location on the ground floor, as predicted, the collection was extremely full in section P–Z, and in particular in P and Q. To be a bit more specific, we were looking at shelving fill rate numbers higher than 90% in some sections. To put that in perspective, it meant that we would

only be leaving about 3 inches per shelf. One new book, the need to shift, or a mistake in measurement and the collection had nowhere to go. This meant that more targeted weeding in P–Z had to occur.

Because bound serials are typically larger than your average monograph, the team decided to focus on weeding serials. Armed with a targeted area to pull from, the team ran overlap reports that compared physical serial holdings against e-journals holdings. Because the library had gained faculty approval during the collection review project to weed physical copies of journals that were available online, the library did not have to seek permission for this weeding project. Student workers began pulling journals where the online holdings completely overlapped physical holdings with no gaps. Over 10,000 volumes with an average measurement of 2.5 inches each were weeded. This gave us a bit of wiggle room in P–Z, but the collection was still tighter than we wanted it to be on move in. But, we were happy because we knew everything would fit!

Running simultaneous with all the collection move projects, a subcommittee of the Internal Library Building Committee was charged with producing the request for proposal (RFP) for the move of the collection. Because this was a move of over 400,000 items, which included our special collections, we knew this was not something we could undertake ourselves. Drafting began in the fall of 2013 and a bid was awarded in spring 2014. When drafting the RFP, it is important to meet with your campus or agency procurement department to make sure that you are drafting your RFP appropriately and including all legal requirements of the institution, and in our case the state of Tennessee. We also took the opportunity to ask for opinions on a few questions that had come up. Namely, should we host a pre-proposal conference, should it be mandatory, should we require a presentation, and how should the committee evaluate the proposals (point system, rubric, etc.)? We gained valuable information in this meeting and were able to write up an RFP document that met all our needs.

In the midst of finalizing the RFP, the library received news from the architect and construction

manager that the project was not on schedule for an early summer 2014 occupancy. A date later in summer 2014 was given, but it became clear quickly that this date was also in jeopardy because it was running too close to the beginning of the fall semester. This forced the library move committee to redraft the RFP to allow companies to provide two bids: one for the move of the circulating and reference collection and another for the move of special collections. Companies could submit one proposal for both, two separate proposals, and one proposal for either move. We did this in order to provide ourselves flexibility in moving if the date continued to be pushed back and we were forced to move in two cycles. This would ensure that the main circulating collection was moved and ready for students when the building opened, without forcing a hurried move of our expensive, fragile, and rare special collections.

Within our RFP, we were very specific. Vendors actually praised us for creating an RFP that was very detailed, because it allowed them to properly and adequately bid on the project. We not only described in detail what needed to be moved, but we provided detail about logistics and floor plans of the current building so that bidders would understand how they would have to work logistically. For example, one line in the RFP says, “both buildings have a single delivery elevator located at the rear and public access elevators that reach all floors” (RFP). Our objective is specific and to the point:

The contractor must move approximately 450,000 print volumes, 10,000 rolls of microfilm, 18 cabinets of microfiche, 10,000 AV items (video and audio), approximately 1,435 linear feet of boxed archival materials and 8,500 books from the library’s Special Collections in multiple locations, and possibly other small groups of items from the old building to the new structure. (RFP)

The scope of work in the RFP included specific details about discrete collections, their size, current location, where they will be moved to, and any special treatment or note specific to the collection. Furthermore, specifics about how the move was to proceed, our requirements for the

protection of the collection, communication expectations, expectations of responsibility (who packs and unpacks, etc.), broad fill rate expectations, and a description of the interfiling that would need to occur and what the responsibility would be for marking interfiles prior to the move was included. The RFP went on to include sections on handling and moving conditions specifying how the mover would prevent damage, protect collections, and prevent accidents, and a requirements section specifying what information the bidder/mover would need to provide in their bid—the agreement to attend an on-site visit and a pre-proposal conference, and the possibility of a presentation, a thorough explanation of their move methodology with answers to specific questions like:

- Who will manage the project?
- Will the vendor use local moving staff or bring their own?

The requirements section also included the need for both professional and institutional references, move methodology, cost proposal, and a general list of our other requirements that were not included in other sections. Other requirements included details like:

- The vehicles used to transport books, collections, and items shall be closed and locked when loaded and not attended.

Being explicit in your expectations is of utmost importance. You do not want to award the contract only to find out that you and your mover don’t see eye-to-eye on some details. Remember, it is your collection and you create the expectations. Library movers with experience expect you to be mandating specific protocols.

The RFP was awarded in late spring 2014 to Hallett Movers. Hallett specializes in commercial and library moving, and has been in business since 1926. This company was chosen based on their professional and thorough response to the RFP, but more importantly, their references. I cannot state enough how important references were in the decision-making process. References provided detailed information about the professional nature of the companies, how conflicts and

problems were resolved, how materials were handled, and how communication was coordinated. They provided detailed information about their particular move and why the company they chose either helped or hurt the outcome. Choosing the right company for your particular move is one of the most important things you can do. Following up with references and asking specific questions of them can make your choice much easier.

As I mentioned above, the RFP touched on the number of interfiles that needed to occur with the consolidation of the collection onto one floor. At the writing of the RFP, there were right at 1,300 call number integrations that needed to occur. These were mostly consolidation of serial runs that were housed between two floors in the current building. Within the RFP, we stated that the moving company would be responsible for 900 of those 1,300 integrations. This meant that the library was responsible for completing 400 integrations before the movers arrived. It was to our utmost advantage to complete as many integrations as possible so that the move time would be shorter and less complicated. Also, with fewer integrations there would be less room for errors. To tackle the integrations, data from the item inventory and measurement project was pulled that provided information on each integration. We analyzed the data and separated integrations out by the number of volumes and space needed for each integration. Because we knew how much space was available on each shelf of the library, we were able to pinpoint integrations that could be accomplished with little to no shifting. We created google sheets for student workers to work off of and set them about pulling items and completing the “easy” integrations. At the same time, our stacks maintenance supervisor was leading another group of student workers on shifting projects that would accommodate integrations that were more complicated and required more shelf space. Our goal was to continue integrations up until the moving company arrived on site.

We had begun the integrations project by focusing on serial runs. At the time, serials were housed on two floors. Everything pre-1950 was housed on

the 3rd floor along with the library’s monograph collection. Everything post-1950 was housed on the library’s 2nd floor. No monographs were housed on the 2nd floor. We focused on moving serial runs from the 3rd floor down to the 2nd floor. However, after analyzing our data more closely, we shifted gears and stopped focusing on format type and started looking at how we could create fewer integrations by creating longer contiguous runs of call numbers. This meant that we began moving monographs and serials up and down between floors in order to fill in gaps in call number sequences. This ended up being a winning strategy, and when we finished integrations in October 2014, we were left with only 286 integrations.

During this same time period, staff and student workers from special collections performed a final inventory and measurement of all collections (manuscripts, rare books, university archives, and art and artifacts.) Special collections were housed in three different locations within the current building, but would need to be relocated to one space within the new building; a closed stacks location utilizing compact shelving. The final inventory ensured that all boxes, art pieces, and various items were properly tagged and labeled so that movers would be able to relocate them appropriately in the new space and so that the special collections staff would be able to account for all objects once they had been moved. Student workers along with two staff members completed the inventory in approximately 3 weeks.

With so many things moving around in the building during the fall of 2014, and because the move was scheduled at that point for early December 2014, it did not make sense to spend valuable staff time changing catalog locations for items we were interfiling. If our building were more complicated (more floors, more unique collections) it would have been imperative to keep the OPAC up-to-date with shelving location changes. However, since items were either on the 2nd floor or the 3rd floor, we decided to focus on the physical moving of items and provide signage to patrons that said, “Can’t find your item, check on the 2nd floor/3rd floor.” We also provided lists of completed integrations and moves to all service

desks so that they could assist patrons with locating items. Since we would be bulk changing all locations in our OPAC in one fell swoop with the move to the new building at the end of the semester, providing good signage and information to our public services staff made more sense than wasting staff time to make catalog changes. After the integrations were completed, student workers tagged each of the remaining 286 integrations. These tags read like end-cap signs. They included the call numbers of the items that needed to be pulled from another floor to fill the gap. These tags also served as important indicators to patrons for where items were currently living within the collection. If a patron came across one of the bright pink tags, they could read it and know to go to the other floor if their item fell between those call numbers.

Hallett's pre-move team arrived on site in mid-November 2014. This team worked closely with the library move point person on finalizing details. They worked quickly to measure the entire collection, got a handle on the number and size of interfiles, began analyzing their measurement numbers, and mapped the collection into the new space accordingly. We worked with them to provide optimal fill rates per particular call number ranges based on our prior analysis of the collection. With their data, we were able to accurately map out the collection and spread fill rates and empty shelves across the entirety of the main collection. In P-Z, which was very crowded, we worked to gain as much growth room as possible in particular areas; squeezing more of the collection into specific call numbers that were not growing. Once we settled on fill rates, Hallett tagged the entire collection. Using the fill rates by call number range, a team of taggers armed with numbered and color-coded tape and measuring string worked through the collection, tagging books and shelves. These tags were then replicated on the empty shelving within the new building. When the movers arrived, they simply matched up tags from the old building to the corresponding tags in the new building. What this meant was that the movers did not have to work sequentially through the move; starting at A and ending at Z. Movers worked in multiple areas of

the stacks simultaneously. This same system was used within the various locations housing special collections in the current building as well. It allowed for items in disparate locations to be effectively mapped and combined into single shelving locations within the new special collections stacks in the new building. This method proved very advantageous in our move in particular because we were moving into compact shelving, combining items from disparate locations, and working on a short time frame for completion.

The moving crew arrived on campus on December 8, 2014. They were given 3 weeks to complete the move. This would have them completing the move of both the general and special collections by December 29th. Because the library had completed so many collection clean-up projects, completed the majority of the integrations, and worked closely on mapping and measuring the collection with the movers accurately, the move ended up finishing on December 19, a mere 11 days after beginning. The library movers were able to work throughout the collection and move between the buildings efficiently. No technical problems were encountered, and open lines of communications between mover and library point personnel worked flawlessly. The collection remained open to patrons via a paging service throughout the entire process. Special collections, including art and artifacts, was moved after the general collection on the final day of the move. Special packaging and care were used in the transition of materials. Library staff chose to move the most rare and expensive items ourselves.

In the end, the library collection was only closed to the public for browsing during those 11 days. The collection opened officially in the new building on December 29, 2015 and has not been closed since. We have had no major problems with the collection since the move. Things were shelved properly and we have not had to perform any major shifts. The physical move of the collection ended up being the one project that occurred with zero problems. This was due to the time taken to clean up the collection through inventorying, measuring, weeding, and interfiling that was completed before movers arrived.

In the end, the key to our success lay in two areas: the luxury of time to plan and prepare and the people chosen for the move committee. UTC, in the end, had 7 years to plan for the move. This is both a luxury and a curse. With so much time to plan, there was so much time for things to change. On the other hand, we were afforded the opportunity to complete an entire collection review and inventory process that many libraries would not be able to complete. That said, without this data, it would have been almost impossible to have accurately mapped our collection to the new building without running into major space problems. In terms of people, the UTC Library put together a smart, agile, and knowledgeable team to take on the move. A project manager was able to coordinate the larger projects and handle any small issues that came up throughout. Other team members focused their talents on data mining and projections, stacks maintenance and student worker management, RFP drafting, and campus communications. Weekly and sometimes twice weekly meetings kept everyone informed of project timelines and objectives. I will point out that having a staff member on the committee who was astute at Excel, Access, and math in general was also helpful when it came to mapping

collections, figuring fill rates, weeding, and figuring out creative ways to solve space problems. Finally, I can't say enough for having a dedicated group of student workers who completed a whole lot of work in a short amount of time. Any library planning a move should consider asking their campus for a larger student allocation to help with projects surrounding their move. Students can perform a plethora of tasks that just cannot be completed by library staff alone. Finally, attention to detail both in project planning and choosing the right library mover for our project proved exponentially beneficial.

In a library move, the details matter. Underestimating the intricacy of your move, the size of your collection, and the time it takes to complete a necessary project, or not utilizing the right people can mire your project and leave you with having to make drastic decisions in the end. Worse, you could be left with a project that is over budget and not completed to your satisfaction. Knowing your collection is important, but planning what you want your collection to be in your new space takes time, people, and good planning.