

Everything Must Move: Coordinating the Implementation of a Large Collection Merger[†]

Giovanna Badia

Moving a library collection is a large undertaking that involves numerous details and impacts a significant number of individuals. The literature on library collection moves is abundant, mostly consisting of authors' reports of what happened at their institutions. In her classic how-to textbook on this topic, Elizabeth Chamberlain Habich (2010) lists 200 articles published from 1929-2006 that describe library collection moves, and more accounts have been published since then (e.g., Bridges, 2009; Czechowski, Barger, Fort, & Maxeiner, 2010; Sharpe, 2012). However, only a few articles provide details of the personnel involved in the move and how they participated (e.g., Baumann, 2006; Calderhead, 1997; Czechowski et al., 2010; Snow, 2004). The purpose of this chapter is to describe the human logistics involved in implementing the move and integration of library collections, specifically the organizational structure required for efficient implementation and the different roles performed by a move coordinator. This chapter will draw from the literature and from the author's recent experience as a move coordinator for the integration of two large print collections in an academic library system. It will also discuss issues that can arise during the cleanup phase that occurs after implementing a large-scale project.

Background

The McGill Library, located in Montreal, Quebec, is a system of 14 branch libraries and reading rooms. It serves McGill University, a large research-intensive institution with undergraduate and graduate programs and a population of approximately 38,500 students. In 2013, the McGill Library merged its education and life sciences collections with two of its other branch libraries. The education collection, housed in the same building as the Faculty of Education, was moved and incorporated into the Humanities & Social Sciences Library. The life sciences collection, located in the same building as the Faculty of Medicine, was transferred and integrated into the Schulich Library of Science & Engineering. This chapter will focus on the move of the life sciences collection and its integration into the Schulich Library of Science & Engineering.

The moves were not simple transfers from points A to B. Some items in the education and life sciences collections were sent to the library's storage location due to space constraints. The moves to storage happened during the same time period as these collections were being moved to another branch. Life sciences books not borrowed in the past 5 years (~45,000 items), some life sciences journals, and existing books in the Schulich Library of Science & Engineering that had not been borrowed in the past 10 years (~62,000 items) were sent to

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storage in order to accommodate the merged life sciences, physical sciences, and engineering collections at the Schulich Library. Before the move of the life sciences collection, staff across the McGill Library system tipped forward on the shelves all the items in the Life Sciences Library and Schulich Library that were destined for storage. Circa 30% of the life sciences collection and 30% of the physical sciences and engineering collection were tipped and sent to storage. At the Schulich Library, the movers then pulled the tipped books from the shelves, packed them in boxes, and shifted the remaining items. This was done one floor at a time. Boxes, containing materials from the life sciences collection in call number order, arrived in batches. These batches usually contained the items that needed to be integrated on a specific floor and were shelved according to their call numbers by library staff or movers within a span of a few days after they arrived. Every book and journal at the Schulich Library moved floor or shelf to incorporate the life sciences collection. The boxes of tipped books at the Schulich Library were transported to storage and unpacked there, after the move and integration of the life sciences collection was finished. The movers were divided into teams, with different teams working simultaneously in each of the different locations; for example, as a group of 3-4 movers were boxing tipped books, shifting, or unpacking life sciences items at the Schulich Library, another team of 3-4 movers was packing up the collection at the Life Sciences Library.

The process for integrating the life sciences collection at the Schulich Library can be summarized as follows: 1) physical sciences and engineering books not borrowed in 10 years were selected for storage and tipped forward on the shelves by library employees; 2) movers packed the tipped books and put the boxes aside; 3) movers shifted the remaining items on the shelves and, with assistance from library staff, unpacked boxes of life sciences items and shelved them; and 4) movers brought the boxes of tipped books to the library's storage location, built shelves, and unpacked them. Steps 2 and 3 were frequently done consecutively on a specific floor before moving to the next floor and repeating the process.

Management support

The planning and implementation of the collection moves and integrations was a large-scale project that had to proceed swiftly from conception to completion in just four months. Support from the library's senior administration, enough manpower, and a clear objective that was communicated widely and repeatedly to library personnel were some factors that led to its completion in a timely manner. The importance of factors such as these is reflected in the literature. In her study on how library employees in Ontario manage projects, Horwath (2012) mentions that researchers in the project management literature in general agree that: "management support for and involvement in the project, adequate staffing for the project, a project plan that details goals, timelines, budget and staff, a clearly defined mission for the project, project monitoring to ensure plan targets are being met, and clear communication channels" contribute to a positive outcome (Horwath, 2012, p. 17). Over half of the 92 participants (about 55%) in Horwath's study indicated that "management support for the project" was a "very important" factor for its success (p. 20).

Management support was an important project success factor for the move and integration of McGill Library's education and life sciences collections. Full hands-on support from the Dean's

Cabinet (McGill Library's senior administration group) helped keep the project on schedule. The Dean's Cabinet is composed of the Dean of Libraries and a mix of associate deans, directors, and administrative support staff. The library's Senior Director of Planning & Resources, a member of the Dean's Cabinet, was the lead project manager for the education and life sciences collection moves. There were also move coordinators on each site to provide directions to the movers. The move coordinators were library staff members who, for the duration of the project, reported directly to the Senior Director of Planning & Resources for this project, thereby skipping a level or two in the library's organizational hierarchy. This flattened reporting structure made it possible for the move coordinators to rapidly acquire human or material resources when faced with obstacles or laborious tasks that would have slowed the project down. For instance, additional library personnel were needed to shelve materials when life sciences books started arriving in batches of 50 and 100 boxes at the Schulich Library. One of the move coordinators approached the Senior Director of Planning & Resources about obtaining additional manpower. On the same day, the Senior Director contacted head librarians across the McGill Library system to ask them to send one or two of their staff members to shelve for 90-minute shifts. Additional help was thus quickly obtained, with staff from other branches shelving at the Schulich Library the very next day.

Access to sufficient human resources was a factor that worked in tandem with support from upper management to assist in keeping the project on track. The final decisions to move the education and life sciences collections were made at the end of June and the target completion date for tipping the books at the Schulich Library was set for July 31st. The senior administration planned for the majority of the moving to occur during the summer months in order to minimize the impact on the McGill community. Tipping the ~62,000 books at the Schulich Library that were destined for storage was a labor-intensive task that took an estimated 350 hours and necessitated the involvement of staff from multiple branches and departments in the library system to complete it on schedule. Schulich Library staff (12 individuals) tipped half of the books during the last week of June and the first three weeks of July. During this same time, staff from other libraries were helping to tip the materials at the Life Sciences Library that were going to storage. The remaining items would be moved to the Schulich Library. The Dean of Libraries and the Senior Director of Planning & Resources each made periodic calls for volunteer tippers during that summer. The request was made at the weekly managers' meetings, when the dean, directors, head librarians, and department supervisors meet to discuss issues across the library system, as well as included in the summary of the managers' meetings that the library's communications officer sends to all library staff. On the afternoon before the July 31st tipping deadline, the Dean of Libraries sent an email to all head librarians and department supervisors to ask that they organize and send as many volunteers as possible to help finish the task. This call helped to double the number of volunteers for the day and the tipping was finished on time.

Through their words and actions that summer, members of the Dean's Cabinet clearly communicated to all library employees that moving the education and life sciences collections was the top priority. Dean's Cabinet members volunteered their time to tip materials in all the affected libraries. Tipping was presented as a vital service to the whole library system.

Depending on their supervisor, some employees were told to volunteer, what some people jokingly referred to as “voluntold,” and others were asked. Regardless of how they were approached, the majority of tippers showed up with a positive attitude. Each supervisor ensured that there was adequate service desk coverage at the branch while some of their staff were away tipping. In total, 37 paraprofessionals/administrative staff and 21 librarians came from other branches in the McGill Library system to help tip books at the Schulich Library. These individuals contributed 170 hours to the project during the last 8 working days in the month of July. Including Schulich Library staff, 40% of the entire library workforce was involved. This participation rate would be considerably higher if it were adjusted to account for the availability of volunteers, since there were many library staff members away on summer vacation during that period. To show her appreciation and thank everyone for their collaboration and good will, the Dean hosted a free pizza lunch for library staff, which was held a week after the tipping was completed at the Schulich Library.

Roles of a move coordinator

During the tipping phase of the project, move coordinators at the Schulich Library organized the scheduling of the volunteer tippers, showed them what needed to be done, delegated sections of the collection to tippers at appropriate times so that individuals did not bump into each other in the book aisles while working, and answered any questions raised. This is just one example illustrating some of the tasks that the move coordinators performed.

A move coordinator is a library staff person who interacts directly with the movers during a collection move, representing the interests of the library, and participates in planning the move with the library's senior administration or move committee. Both library professionals and movers state in the literature that there should be a designated person(s) giving directions to the movers in order to avoid transmitting conflicting information (Baumann, 2006; Tanner, 1993). The library's move coordinator should give orders to the movers' supervisor, who communicates it in turn to the movers (Tanner, 1993). In her article about the transfer and incorporation of a university's chemistry library into its main campus library, Calderhead explains that “the term 'coordinator' was used rather than 'leader,' because it was assumed all parties knew their particular task better than any other party. However, the well-being of the library was the 'boss' or 'leader.' Generally speaking, a librarian knows the library better than the contractors, even if libraries are their particular specialty” (1997, p. 73). Library staff and the library's community of users are the ones that live with the consequences of a move after the contractors leave; therefore, the onus is on the library's move coordinator to ensure that the move is executed correctly. The move coordinator is involved in more daily supervision if a general moving company is hired to do the job rather than a company that specializes in moving libraries (Snow, 2004). In a survey of 82 ARL member libraries about moving collections, “over 62 percent of libraries utilized trained library movers over any other collection transport method, even though this was likely more expensive than other options available to them” (Atkins & Hain Teper, 2005, pp. 75-76). For the education and life sciences collection relocations, McGill Library hired the university's preferred moving company, with whom it had a previous working relationship in moving the library's collections.

There were two move coordinators at the Life Sciences Library and another two at the Schulich Library during the relocation of the life sciences collection, which enabled the co-coordinators to divide the labour, support one another, and ensure that the library's interests were always represented when one coordinator was away. The author, who is a liaison librarian, and the branch's circulation supervisor were Schulich Library's move coordinators. The librarian who was head of the Schulich Library at the time of the move had formulated the collection layout floor plans that showed what a merged collection would look like, with call number ranges indicated on the plans for each of the shelving units in the library. The Schulich co-coordinators used these floor plans as a guide when managing the implementation of the move. They shared an office during the project, making it easier to work together and keep each other informed of any updates that occurred in the other's absence. In addition to overseeing the work of the movers and volunteer tippers, the move coordinators were also responsible for sending daily updates to library staff about the integration of the life sciences collection into the Schulich Library of Science & Engineering, which the communications officer then quickly posted on the library's website. They also supervised the work of four library student workers on the project, which included shelving, shifting, shelf reading, sign making, and inventory; and worked closely with librarians and library support staff in other departments to update the catalogue, the library's floor plans, and the website.

The move coordinators took on the following roles to accomplish the tasks required of their position:

- **Troubleshooter** – Solving any problems that arose with the project, e.g., the move coordinators made space where there was none by using study carrels, carts, and tables as temporary shelving units to allow library staff to shelve incoming life sciences materials at the same time as movers were packing tipped books or shifting items.
- **Implementer** – Executing the merging of the collections, e.g., the move coordinators frequently met with the movers' supervisor to create and revise step-by-step plans for how the items would be shifted, whether the shifting would be performed backwards or forwards on a part of a floor or on the entire floor, how much space to leave empty on the shelves in certain call number ranges on a particular floor, etc.
- **Teacher** – Training the movers, e.g., the move coordinators explained how call numbers functioned and the reasoning behind the shelving arrangement in the library.
- **Advisor-critic** – Providing objective advice to senior administrators, e.g., the move coordinators reported directly to the Senior Director of Planning & Resources, which gave them a greater opportunity to provide advice on other projects that affected the move at the Schulich Library, such as recommending that another moving company be hired to move the life sciences librarians' office furniture into the Schulich Library so that the process of integrating the life sciences collection would not be halted for the week-long office move.
- **Environmental sensor** – Foreseeing future problems and acting to prevent them, e.g., the Dean's Cabinet initially decided to list the collections at the Life Sciences Library and the Schulich Library as "temporarily unavailable" in the library catalogue while the life sciences collection was being relocated. The move coordinators recommended that the existing collection at the Schulich Library not be labeled with this message since the

materials would always be accessible to the community during the move; they would just have been shifted to a different shelf in the building. Listing the Schulich Library materials as “temporarily unavailable” would have caused unnecessary delays for patrons and more work for library staff who would have had to retrieve the items off the shelves. Rather, temporary signs indicating call number ranges were updated on a daily basis to reflect the shifting that had been completed in that area.

The troubleshooter, implementer, teacher, advisor-critic, and environmental sensor roles are also described by internal consultants to explain what they do (Kelley, 1979). Internal consultants are staff members within the organization who perform similar functions to traditional external consultants, such as problem solving, advising the head of an organization, interpreting research, and implementing new programs, and are directly accountable to their sponsor. Consultants, whether internal or external, will often work on projects that either require them to provide possible solutions to a problem or to implement a solution. The two are not mutually exclusive, but the focus of the consultants’ work may be on one or the other (Harrison, 1974). A move coordinator can be seen as an internal consultant, both in terms of the equivalent roles that the coordinator plays and his/her unparalleled access to senior administration during the duration of the project. It may be useful to view the functions of a move coordinator from this perspective to better understand what skills and relationships with upper management are needed for a move coordinator to be successful. Coordinating a move is more than just interacting with moving staff on the library’s behalf; it also means advising the library’s senior administration or move committee on decisions about the move. It requires seeing the larger picture and making it happen, i.e., keeping track of all the parts of the move and visualizing what the end result will look like in order to create a detailed, step-by-step method for transforming an abstract, such as floor plans showing a merged collection, into reality (Fortriede, 2010; Tucker, 1999).

Cleanup

The process of moving and integrating the life sciences collection into the Schulich Library of Science & Engineering started at the end of June 2013 and finished with the last batch of life sciences books being unpacked and shelved on October 8th, 2013. Though the major work of the relocation was finished, the cleanup phase had just begun. Tasks common in a cleanup include: shelf reading, updating stack signage, re-shifting parts of the collection to distribute growth space more evenly, and correcting errors in the work completed (Habich, 2010). The majority of errors in the life sciences collection move consisted of misshelving and misdirected items (some materials were transported to McGill Library’s storage location instead of the Schulich Library branch and vice versa). Habich (2010) recommends making a list of cleanup tasks, also known as a “punch list,” assigning specific individuals or groups to finish each task, and identifying deadlines for completing each task. She states that the resolution of punch list items may take several months to accomplish depending on the number and complexity of the items on the list (Habich, 2010). The majority of items on Schulich Library’s punch list were completed in the year that followed. The time period for cleanup can be shortened if the punch list is created immediately after the moving is over and support from upper management

is obtained for assigning additional human resources to tackle the jobs on the list. A move is considered truly finished when all the items on the punch list have been done.

Conclusion

Moving library collections is a detailed and intensive enterprise that requires the participation and goodwill of numerous individuals, at all levels, both inside and outside of the library, to make it happen on schedule. The move coordinator manages the daily logistics of the move and is just one example of the multiple players involved in this large operation. Active involvement and continuing support from the library's senior administration is necessary to encourage as many staff members as possible to participate. Library employees will more likely be encouraged to contribute if they see their superiors working in the frontlines of the move.

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