Case Study 8

Managing a Library Renovation Project: A Team Approach

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OVERVIEW

Setting/resources: The Lamar Soutter Library is a midsized academic health science library. The library employs forty-one full-time employees and occupies 41,000 square feet within the University of Massachusetts Medical School. The library renovation budget was $1.5 million.

Objective: The goal of the library renovation was to improve the functionality of user service points, increase overall comfort, improve the general appearance, and update staff and public areas to incorporate current advances in technology. The library has used a team-based approach to operational problem solving since 1998. Use of this team structure allowed the inclusion of faculty, students, administration, and library staff in the renovation project.

Methods: In 1998, the first Facilities Team was formed to look at the condition of the library and recommend both short- and long-term improvements. Four other teams were created and given charges ranging from studying building options to following up with problems after the renovation was completed. Teams included representatives from all library departments and from a variety of university departments.

Results: Completed in spring 2003, the renovation project successfully improved the library's physical space by offering more seating options, better lighting, and increased accessibil-

ity to the library's resources. Staff work areas were also enhanced by organizing staff by department and creating an open work environment that is more conducive to collaboration.

Conclusion: The team-based approach included faculty, staff, and students in the decision-making process throughout the project, and gave them a sense of ownership and pride for the "new" library. Team-based decisions created staff buy-in and staff support of renovation changes. Involving staff and users proved to be invaluable in completing a project that truly met the needs of the library's users.

INTRODUCTION

In 1998, the Lamar Soutter Library of the University of Massachusetts Medical School introduced a team-based approach to problem solving. Pilot teams were formed on a variety of topics ranging from staff development to outreach and education. The first facilities team was formed as a part of this pilot project. Because this team was a success, it became the foundation for four future remodel teams: the space study team, remodel planning team, remodel implementation team, and remodel follow-up team.

Library management believed that having staff members and library users involved with all future facilities teams would help create buy-in to facilities projects, and would allow all changes to focus on the needs of the people using the library's services and staff work spaces. Expanding team membership to include staff members from across library departments, external architects, and staff from other university departments allowed teams to capitalize on a diverse set of skills and lead to more creative problem solving.

Setting/Resources

Founded in 1976, the Lamar Soutter Library is a midsized academic health science library that serves the University of Massachusetts Medical School's School of Medicine, Graduate School of Nursing, and Graduate School of Biomedical Sciences. At the start of the renovation project in 1999, there were thirty-seven full-time equivalent (FTE) employees, and the library housed 625,000 volumes in 41,318 square feet.
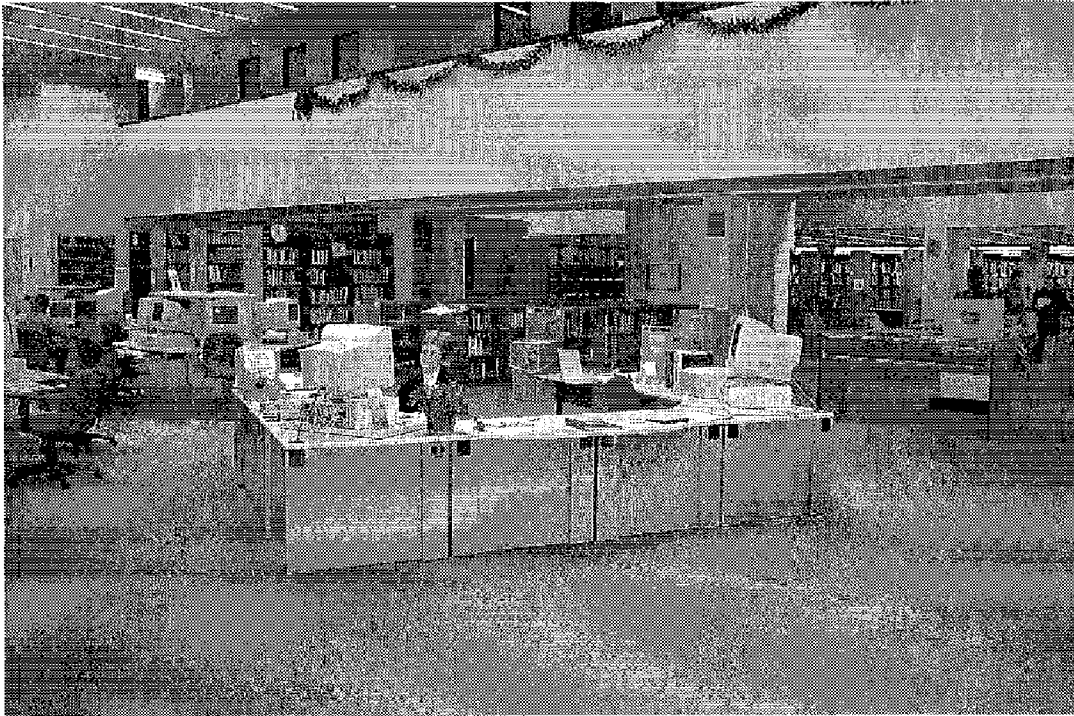
PHOTO 8.2. Prerenovation reference desk. Photo by Mary E. Piorun. Reprinted with permission.

The library's location within the Medical School building adds to its high annual visitor rate of approximately 400,000 students, researchers, clinicians, and members of the public. For students, the library has always been more than a place to study by serving as the only computing center on campus and functioning as the school's social center. This "social center" atmosphere sometimes conflicts with the needs of researchers and clinicians when noise travels from the first floor to the third floor, making it difficult to find quiet space for research and study.

Although the library frequently experimented with relocating collections and service points, and added network cabling whenever possible, an overall plan was not developed to accommodate the growing collection and changes in technology. By the 1990s, the growth of the collection made it increasingly difficult to shelve books and journals. The number of staff members had grown along with the collection, which meant that staff members were forced to share workspaces, and members of the same department were not always seated together because of limited space and poor office layouts. Tall partitions in

Encompassing three floors, the library surrounds a three-story atrium with skylights designed to be the primary source of light in the principal study area. The library is accessed from one entrance on the first floor of the Medical School. The circulation and reference desks are both located near this entrance. The first floor contains the book collection, government documents, and current journals, as well as staff workspaces for reference, access services, systems, and technical services departments. Library administrative offices are located on the second floor, which also offers a mezzanine area for studying and fifty-six individual study carrels for students. An additional fifty-six study carrels are located on the third floor. Bound journals are shelved on the second and third floors.

Prior to the renovation, the circulation desk was constructed of wood, cement, and granite, and the reference desk was made of traditional modular furniture. Seventy-five computer terminals were located in the front section of the library's first floor and were separated by a six-foot wall that obstructed visibility across the floor (see Photos 8.1 and 8.2).
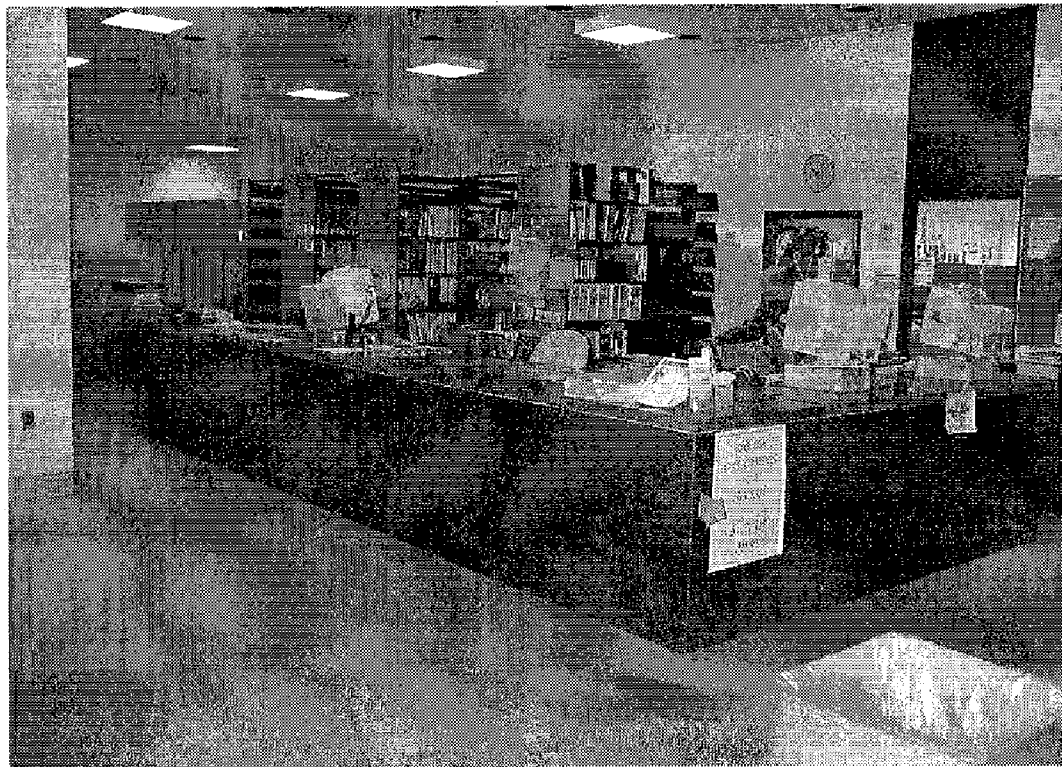

PHOTO 8.1. Prerenovation circulation desk. Photo by Mary E. Piorun. Reprinted with permission.

some areas isolated staff from one another and made it difficult for air to circulate properly.

Objective

The overall objective of the renovation project was to improve the functionality of the library for both staff members and patrons by using a team-based approach to the project's planning, management, and implementation. This approach was important to library management, who believed that consulting with staff and library users about their needs and desires would result in the most effective improvements to the facility.

Consultations with library staff members revealed that in order to perform their jobs more effectively, they needed to work in areas organized by department with their manager's office in close proximity to their workspace. Systems, technical services, and access services staff needed more space. The systems department did not have enough storage space for equipment or the means to secure it properly. In the technical services area, a more open work environment was desired, because workflow (unpacking, sorting, processing, and arranging of materials for cataloging) and collaboration were hindered by the high partitions between workplaces. Access services staff needed room for printers, fax machines, and photocopiers, and secure areas to store laptops and personal items. Because most access services staff shared work areas, additional computer workstations were required to perform off-desk duties. The access services department also needed additional shelving for reserve materials and requested locating the circulation desk closer to the library entrance for better oversight and control of items leaving the library.

Library staff sought to design more effective areas for both formal and informal bibliographic instruction, as well as areas for small group study and collaboration. To meet patrons' computing needs, the library hoped to increase the number of computing stations, upgrade the wireless network, and increase the number of data ports for laptops. The library also recognized a need to create identifiable public service desks placed in locations that would be easy for patrons to find, and that would be located centrally to the materials needed for efficient operations. Additional shelving was needed to accommodate the growing collection and to provide collection layout options that focused on patron needs. Patrons also requested noise reduction

between floors. Finally, the renovation sought to provide a more open and welcoming atmosphere with an updated look and more options for comfortable seating and better lighting (see Photos 8.3 and 8.4).

Throughout the renovation process, library staff communicated with patrons regarding current and future facility changes. The status of library services remained a priority. It was imperative to keep the library open throughout the entire renovation and to continuously apprise patrons of changes that affected services or collections.

METHODS

Library management was committed to using a team model in managing the renovation project, and issued a formal charge to each
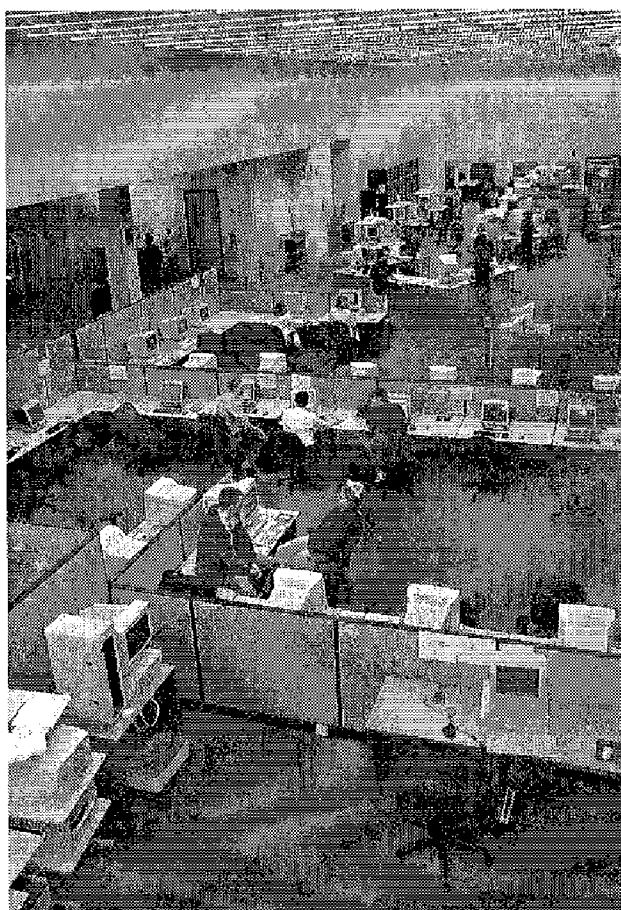

PHOTO 8.3. Prerenovation computing area. Photo by Mary E. Piorun. Reprinted with permission.

PHOTO 8.4. Prerenovation study tables. Photo by Mary E. Piorun. Reprinted with permission.

team. Each team was assigned a chairperson who called meetings to order and set an agenda for each meeting; a champion who worked with the team chairperson to bring formal requests to management; and team members. Teams consisted of library staff and, when appropriate, people from outside of the library. Library management tried to match individual talents with project needs to assemble the most productive and successful teams possible. Through the formation of five teams, each with its own objective, the library worked through the planning process, developed an implementation timeline, and handled the issues of day-to-day project management.

Facilities Team, 1998-1999

First formed in 1998, the facilities team operated before renovation planning began. This team was charged with considering particular facilities issues that could be addressed immediately within the library's operating budget and recommending ways to resolve each issue. The team also identified renovation changes that would require budgeting and approval from Medical School administration. Facilities team membership was limited to library staff.

Space Study Team, 1999-2000

A space study team was created by school administration in 1999 to address the issues raised by the facilities team. The facilities department assigned an official project manager to work on the library renovation project. This project manager chaired the space study team; team membership consisted primarily of school administration personnel. The charge of the space study team was to propose and evaluate options that would meet the needs of library services and collection requirements, taking into consideration expected growth and future technological advances. Any number of options could be proposed, but the team needed to consider cost, time frame, state construction process requirements, ADA compliance, and to take into account larger campus modernization projects. The team recognized the unique skills needed to meet the charge and determined it would be best to outsource the space study to professional architects. *The Medical Library Study* was conducted over one calendar year. This document presented numerous options for renovation including remodeling the current space, building an addition, and building a new library within a new research building. School administration chose to renovate the existing library. This option was agreed upon with the understanding that within ten years, a new library would be constructed in a newly planned research building on the Medical School campus.

Remodel Planning Team, 2000-2001

In fall 2000, the remodel planning team was formed to design the new layout and aesthetics of the Library as proposed in *The Medical Library Study*. Membership for this team consisted of architects, a fa-

cilities project manager, management-level library staff, and various representatives from other school departments, such as telecommunications and networking.

With the formation of the remodel planning team, the library renovation project became a reality. After two years of planning, everyone was excited about being involved in the planning process and looked forward to future changes. The scope of the project was larger than any library team had taken on in the past, but there were clear limits set on this team: one year to propose a design, and a budget of $1.5 million.

The team was responsible for advocating the needs of the library staff and users. Working with the architects, focus groups were conducted with library staff, students, and faculty to learn what people liked about the current library and what improvements needed to be made. The architects examined each task performed by library staff and determined the amount of space necessary to perform that task efficiently. With this knowledge, the architects then experimented with various layouts for office spaces.

The planning team made many purchasing and operational decisions related to furniture, fabrics, color scheme, operating a single reference/circulation desk or two separate desks, building a small group study area and a larger instructional room in existing space, and the overall layout of the entire library. Some of these decisions were based on the input from staff and patrons, and others were made by team members for logistical reasons. The team was often faced with making difficult choices between two desired outcomes, and it became clear that some of the items on the library's "wish list" would have to wait until the new library had been constructed.

Remodel Implementation Team, 2001-2002

To implement the designs created by the remodel planning team, the remodel implementation team was formed in 2001. This team was made up of three permanent members: Director of Library Services; Associate Director of Systems for the Library; and the Facilities Project Manager, and other library managers who attended team meetings when the topic for discussion affected their department. The implementation team also met with representatives from school depart-

ments (information services, telecommunications, etc.) and outside vendors when appropriate.

The Facilities Project Manager served as the liaison for the planning team with all contractors and vendors. All changes to plans written by the remodel planning team had to be approved through the Facilities Project Manager, because this person was ultimately responsible for making sure that the project stayed on schedule, was implemented according to plan, and was completed within the approved $1.5 million budget.

The implementation team was responsible for establishing and adjusting a timeline to ensure minimal disruption for students and faculty. This timeline for the overall project was created early in the team's existence and provided a framework for the major construction phases that would be completed throughout the remodel project. At each meeting, the team used this master timeline to formulate detailed project timelines for each specific area of construction to be performed in the following week. The detailed project timelines allowed for the numerous changes in construction schedules, delivery of furniture, etc.

The implementation team was also responsible for keeping library patrons and staff informed of how the construction process would affect them on a daily/weekly basis. To achieve this goal, poster-board signs were placed at the library entrance detailing remodel progress and which library services were affected. These signs also indicated the predicted noise level for the day, giving patrons the option to pick up free earplugs at the circulation desk if they needed some quiet study time. The display case outside of the library entrance provided patrons with information about the remodel project, as did the library's newsletter, the *SoutteReview*. The Director of Library Services provided the library staff with a weekly update regarding the status of the remodel project and what to expect in the near future.

Remodel Follow-Up Team, 2002-2003

After the major aspects of the renovation had been completed, some unresolved issues remained. The remodel follow-up team was created in 2002 to identify problems resulting from the remodel project and to look at building aesthetics and make recommendations regarding signage, artwork, plants, etc. Every department in the library was asked to

volunteer one staff member to the follow-up team, so that concerns from each department could be addressed at team meetings.

The follow-up team inspected the library and surveyed other library staff members to find all problem areas such as spaces that had not been painted, carpet and furniture that was either damaged or had been installed incorrectly, furniture that did not match what had been ordered, and defective items. Once problem areas were identified and included on the team's "punch list," the team needed to determine how to best resolve the problems so that the chairperson could take action to correct the problems through the Facilities Project Manager. The remodel project was not considered officially complete until every item on the punch list was corrected.

Because all signage had been removed during the renovation project, the follow-up team created a proposal to replace it, calling for two types: room signage (which had to conform to Medical School standards), and directional signage (which would be created by the architects who designed the remodel plans). Due to budgetary constraints, the proposal has not been implemented yet.

Artwork for the library was not included in the remodel budget, but the follow-up team felt strongly that the large expanses of blank walls needed some artwork to make the atmosphere less "institutional." The library decided to form a relationship with the Medical School's development office, which is in charge of displaying the works of local artists throughout the school. For a minimal cost, the library was able to install hanging strips and hooks, and to serve as another display location within the Medical School.

Although the follow-up team had what many considered the least-exciting charge of the remodel teams, this team's work was invaluable to the overall project. At a time when everyone was ready to consider the project completed (particularly the outside vendors and contractors), the team solved problems that could easily have been overlooked and forgotten but would have led to a less successful and complete renovation.

RESULTS

The renovation project and its follow up were completed in spring 2003, and marked by a rededication celebration in April 2003. The

completed renovation project successfully satisfied many of the identified needs voiced by the library's patrons and staff. The entire staff of the access services department, which includes interlibrary loan and circulation functions, is now located behind the circulation desk, near the front entrance. The circulation desk provides staff with locked cabinets for their personal items and locked storage areas for laptops, supplies, etc. The circulation desk provides ample room for fax machines, scanners, and printers. Off-desk workstations have increased from one to three. The systems department acquired approximately 400 square feet of space from an area that was previously occupied by the Graduate School of Nursing. This additional space allowed systems to store computer equipment in a secure location. The small cubicles with high walls in the technical services area were transformed into larger, more open spaces that encourage staff collaboration. Shelving space for technical services was also increased (see Photos 8.5 and 8.6).

In addition to the improvements made in the library's staff spaces, the renovation also enhanced public areas. The general computing area was redesigned to offer users more privacy while working and
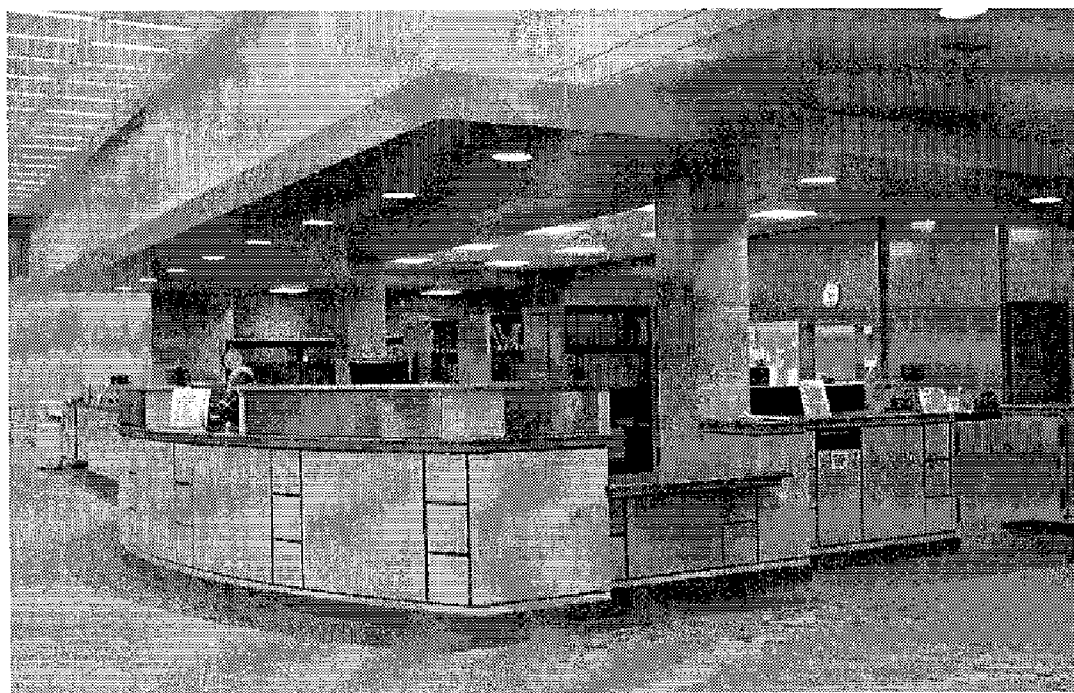

PHOTO 8.5. Postrenovation circulation desk. Photo by Lynn Borella. Reprinted with permission.
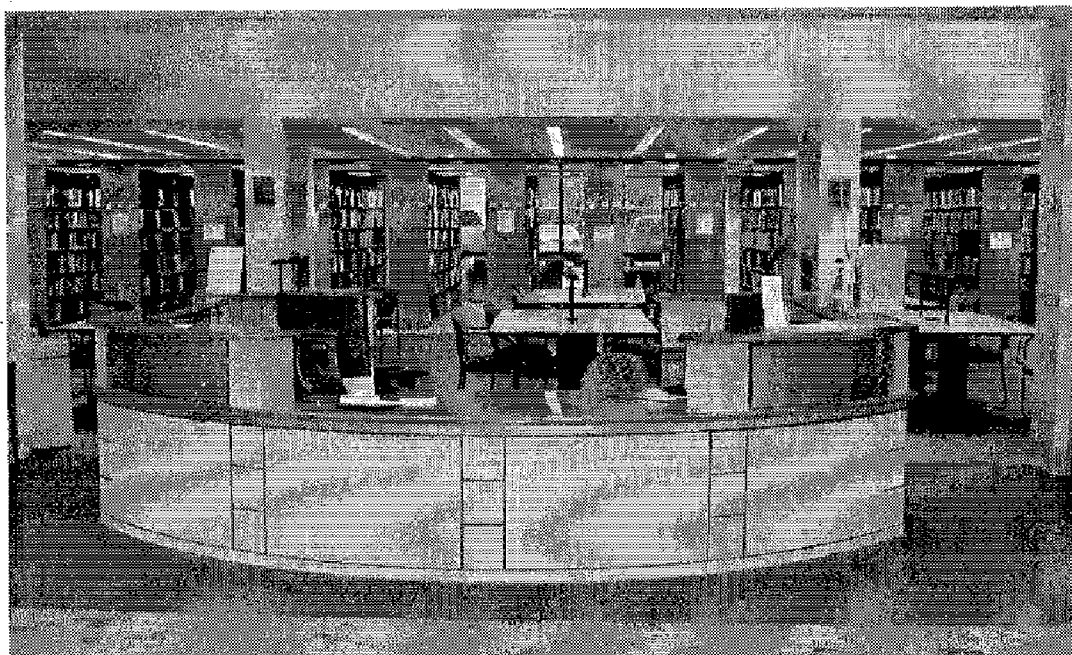
PHOTO 8.6. Postrenovation reference desk. Photo by Lynn Borella. Reprinted with permission.

sufficient workspace while using the computers. Low panels replaced the high partitions between workstations to capitalize on the natural light from the library's atrium. The new circulation and reference desks were both custom-built with common design elements, to be recognized as service points and to better accommodate the needs of both patrons and staff. An audiovisual area was constructed with eight individual viewing stations. Patrons can watch videotapes in a newly constructed group viewing room, which also doubles as a much-needed group study area. Assorted comfortable seating options were placed throughout the library. Improved lighting was added wherever possible, including lighting and electricity at study tables. Sound-proof panels were added to the library's walls and walkways over the main atrium to help muffle conversations and keyboard typing. Overall, the color scheme was changed from dated polyester orange and blue to earth tones. The centralized photocopy room was dismantled and photocopiers were relocated throughout the three floors of the library, placing the copiers closer to points of need within the journal stacks. The vacated space of the former photocopy room was transformed into a state-of-the-art computer classroom for library instruc-

tional services with seating for twenty students, and a smaller, informal training area was built for small group instruction (see Photos 8.7 and 8.8).

The renovation did not address all of the needs of the library's staff and patrons. Building codes prevented the construction of more group study rooms. Although the circulation desk is adjacent to the library's entrance, staff members still feel that the design of the desk does not allow them to process materials close to the security gate and keep the rest of the library in their line of sight. The purchase of a new gate is currently being considered, as is moving the current gate so that it will be closer to the main service point of the circulation desk. As mentioned earlier, library signage was not included in the renovation budget and has not yet been created. Funds for additional atrium lighting were not included in the renovation budget, but alternate funding allowed installation of additional fixtures to supplement natural light.

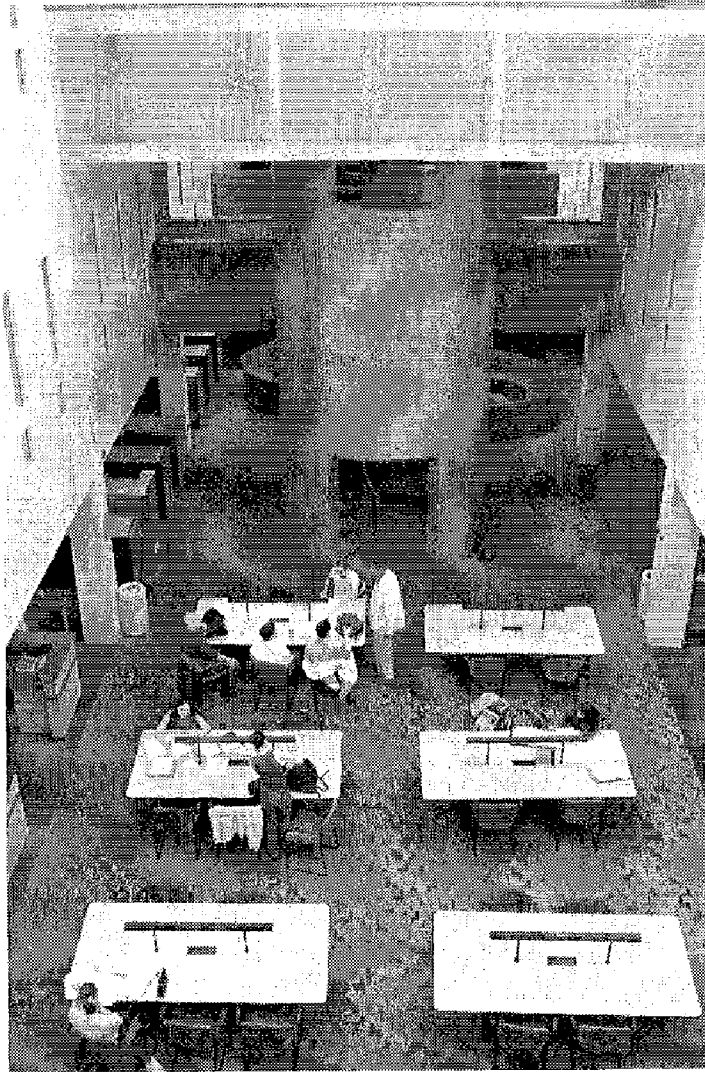PHOTO 8.7. Postrenovation computing area. Photo by Mary E. Piorun. Reprinted with permission.

PHOTO 8.8. Postrenovation study tables. Photo by Lynn Borella. Reprinted with permission.

CONCLUSION

Involving many people in the renovation project through the use of teams resulted in a longer project from start to finish, but this increased project length was well worth the benefits that each of the five renovation teams provided. Involving staff members and patrons in the renovation process allowed troubleshooting to occur during the project rather than at its conclusion. Decisions made in the team structure created staff buy-in, so that when it came time to implement renovation changes, staff supported the changes. The team-based ap-

proach included faculty, staff, and students in the decision-making process and gave them a sense of ownership and pride for the "new" library. For the first time in the library's twenty-eight years of existence, it was featured on the cover of the Medical School's catalog for the 2003-2005 academic years.

Despite the success of the renovation project, the library's need for space planning has not ended. Because the library did not gain extra square footage for collection storage, a team has been created to address the future space needs of the library's growing book and journal collections. Planning has also begun for the creation of the new library as proposed in *The Medical Library Study*.

Because of the success of the five remodel teams, the construction process for the new library will also be managed using the team approach. Learning from the shortcomings of the remodel teams, there will be some changes made to the way teams operate for the new building project. It will be important for the construction teams to take and save minutes from each meeting. Because meeting minutes were not recorded, many steps of the remodel processes are not documented. Staff will also be more involved on the planning team for the new library. Due to staff vacancies, some departments were not always represented on the remodel planning team, which meant that the implementation team was forced to return to the planning phase when staff felt that the designs for their area were not suitable for their work.

Overall, the same process will be followed, because taking the time to study, plan, implement, and follow up was essential to the success of the project. Involving staff and users also proved to be invaluable in completing a project that truly met the needs of the library's users.