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Accidental Project Management in a New Library Storage Facility

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ABSTRACT

Purpose – *This chapter will discuss the project to investigate, recommend, and create user-focused solutions for opening and operating Severn Library, a high-density storage facility, at the University of Maryland in College Park, MD.*

Methodology/approach – *This chapter takes the case study approach, discussing the practical application of project management techniques to various stages of a large-scale project to plan for a high-density storage facility.*

Findings – *Although the Severn Library project began with a large project team, lack of formal project management expertise and the massive nature of the project led to its breakdown into smaller constituent projects, with the two authors filling the roles of "accidental project managers" to complete the work on time. Although this approach was ultimately successful, the overall success of the project could have been improved through more formal application of project management techniques.*

Research Limitations/Implications – *This chapter discusses the experience of the authors at one large, public state university. The experience of other libraries and library managers may vary based on institutional context.*

Practical Implications – *This chapter will be valuable to library managers interested in project management techniques in libraries, and/or in planning for high-density library storage facilities.*

Originality/value – *To the authors' knowledge this is the only writing on the application of project management techniques to construction and operation of a high-density library storage facility.*

Keywords: Project management, High density storage, Case studies, Library collections, Library storage, Off-site storage

INTRODUCTION

In 2010 the University of Maryland purchased a decommissioned *Washington Post* printing plant, thereafter named the Severn Building, approximately half a mile from the main campus in College Park, Maryland. Among the proposed uses for the 324,000 square foot facility was a high-density library storage facility of approximately 21,000 square feet, with space for processing, scanning, and staff offices. After several years of negotiations, design, and planning,

major construction began in early 2015 and the Libraries formed the Severn Library Working Group (SLWG) to investigate, recommend, and create user-focused solutions for opening and operating Severn Library. The keys to the facility were handed over to the UMD Libraries in March 2016, and on October 3, 2016, Severn Library staff began circulating material to University of Maryland users and resource-sharing partner institutions.

This chapter will present a project management case study of what happened between the formation of the Severn Library Working Group in early 2015 and the opening of the facility in late 2016. By focusing on problems encountered by the Working Group and the ways in which the authors became "accidental project managers" over the life of the Severn Library project, this chapter will provide valuable examples of how libraries can use formal project management techniques to achieve success on projects of this magnitude and complexity. Although the focus is on planning for a high-density storage facility, managers should find in this chapter a model of project-related leadership and problem solving that will be of value for any large library project.

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INSTITUTIONAL CONTEXT

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The University of Maryland is a major public research university in College Park, less than ten miles north of Washington, D.C. It is the flagship institution of the University System of Maryland and offers 91 undergraduate majors and more than 200 graduate degrees through programs in twelve colleges and schools. The University has a total enrollment of 37,248 (26,538 undergraduate and 10,710 graduate); a tenured or tenure-track faculty of 1,511, among 4,467 total faculty; and a staff of 5,494.

When this project began, the University Libraries had a collection of approximately 3.5 million volumes, including 500,000 volumes stored in a shared facility with Johns Hopkins University, the Library Services Center, since 2005. The Library Services Center collection was

managed and circulated by Johns Hopkins University library staff, and rental of this space represented a substantial annual expense for the Libraries. Eliminating this expense, as well as gaining more autonomy over its own collections, were two of the key motivations in pursuing the creation of Severn Library.

LITERATURE REVIEW

Early library literature on project management introduced the ideas of the Project Management Institute (PMI) to librarians. These articles typically defined project management, gave tips on how to use it, and explained the advantages to librarians. The earliest such article, "How Do You Manage These Projects?" (Marmion, 1990) ties the history of project management directly to its roots in information technology projects. Marmion defines project management, suggests examples of where project management can benefit libraries, such as collection shifting and library IT projects, and explores the criteria for choosing the right project management software. Another early discussion of project management techniques for the library, "Project Management: Can Libraries Benefit?" (Moore, 1998), explains how using project management techniques can increase the services offered while also decreasing the time and money spent on the project. Bell (1996) describes how Edinburgh University Library used project management principles to manage both recurring and one-time projects.

This cheerleading for the use of formal project management techniques in libraries paid off: by 2008, the literature begins to include articles showcasing the use of these techniques in the library setting, and the separation of project management in libraries into three main types: intentional, systemic, and accidental.

Early use cases of project management in libraries show librarians intentionally using project management techniques on a specific project without the systemic support of their

institution. Generally, these librarians did so for projects that related to digital libraries or digitizing material. This is perhaps unsurprising as the adaptation of project management tools in the information technology sector is quite robust. Therefore, it would be easy for digital librarians to adapt these principles to their needs (Middleton, 1999; Stanley, et al., 2003; Winston & Hoffman, 2008; Zarndt, 2011).

In systemic project management, the entire organization, from the top down, uses a formal project management structure. Project management principles inform every step of the formal process of project planning, including requesting a new project and getting it approved, scheduled, funded, and staffed. Libraries with systemic project management also have training for project managers in the facets of managing projects. The University of Arizona's Library has implemented a formal project management structure (Feeney & Sult, 2011). They used the Brigham Young University *Project Management Process Guide* and were trained by the BYU Assistant Dean for Information Technologies on the process. Robinson Library at the University of Newcastle, at the time of publication, were interested in taking a systemic approach. Chambers and Perrow (1998) explore project management implementation at length, examining past projects for how the projects would have gone better had the library been using systemic project management, and discuss plans for implementation of such a system.

Without systemic support or advanced intention, librarians have often found themselves in the position of "accidental" project managers. This term was used by Revels (2010) to describe library staff who "were assigned to lead a project… [without] any prior formal project management training" (p. 49). The management of these projects sometimes reflects the PMI principles, but only because those principles are a logical way of organizing a project. For example, Anderson's (1998) description of a shelf reading project at University of Illinois

Urbana-Champaign shows how their estimates of staffing needs conformed to PMI principles, without being explicitly named as such. In this case, the project manager methodically established how much labor could be undertaken by staff and how much would need to be accomplished by students, then hired students whose work was overseen by staff.

The authors of this case study have found themselves to be members of this third group, accidental project managers. The authors did not go into managing the project with official project management techniques in mind, and yet can with hindsight identify some PM techniques in the management of the project. This chapter will evaluate the project according to project management principles and show that, despite difficulties, it is not necessarily detrimental for a project to be "accidentally" managed.

APPROACH

This chapter will discuss the five stages of the classic project management approach – Conception and Initiation; Definition and Planning; Launch and Execution; Performance and Control; and Closing – in the context of the work to create a new high-density library storage facility at the University of Maryland. The goal is to provide a practical case study of the ways in which the project did or did not conform to the project management stages, as the project did not intentionally follow the approach as listed above, and the effects this had on the project's overall success. It will also paint a picture of the librarian as "accidental project manager," as described in the literature review, and outline some ways in which more formal adherence to project management principles could have improved results.

FINDINGS

Phase 1: Project Conception and Initiation

Saladis and Kerzner (2009) describe Conception and Initiation as primarily a process of selecting which project to undertake, a process which includes evaluating potential projects for their "value to the organization," thereby establishing the reasoning behind and validation for the chosen project. Decision makers should analyze the project's relationship to "the organization's overall strategy and long-term plan," the feasibility of and organizational limitations to accomplishing the work, tangible and intangible benefits of completing the project, and any required capabilities the organization is lacking which may hamper the project (p. 33). In the case of Severn Library, the value and necessity of the project and its relation to the Libraries' strategic goals were already well-established; the Libraries were facing a crisis of space and the University administration and state government had finally agreed to fund the construction of a long-desired new facility. As a result, a full Project Conception and Initiation phase, in particular, carefully evaluating organizational capability and limitations, did not occur. Questions of expertise to carry out the project planning and appropriate financial and personnel resources to operate the new facility were not considered as carefully as they could have been. If time had allowed, providing training on project management techniques for key Libraries' staff and a more structured project initiation stage could have better equipped the project team for the challenges it faced.

The Libraries formed the Severn Library Working Group (SLWG) in February 2015, a project team of the type described by Chiocchio (2015):

> A project team unites people with varied knowledge, expertise, and experience who, within the life span of the project but over long work cycles, must acquire and pool large amounts of information in order to define or clarify their purpose, adapt or create the

means to progressively elaborate an incrementally or radically new concept, service,

product, activity, or more generally, to generate change. (p. 54).

According to Chiocchio, the idea of "progressive elaboration" is key to defining the project team.

In his analysis, it "captures concepts such as uncertainty, complexity, and the need to plan and

define the project iteratively as information is gathered and work progresses" (p. 56). This idea

certainly applied to the Severn Library Working Group.

At an initial meeting, the group was formally charged to investigate, create, and

recommend user-focused solutions for planning and operating Severn Library. Reporting to the

Associate Dean for Collection Strategies and Services, the group was asked to address these

areas:

- Identification of library collections to send to Severn Library

- Plan for moving materials from College Park libraries and other facilities to Severn
  Library

- Selection of inventory software and other systems and applications necessary for
  operation of Severn Library

- Policies, services, and personnel for long term operation of Severn Library

The Director of User Services and Resource Sharing and the Director of Technical Services and

Strategic Initiatives agreed to co-chair the group, and members were drawn from all of the major

departments in the Libraries, with one or more representatives each from: Collection

Management; Consortial Library Applications and Support[1]; Metadata Services; Preservation;

Research and Learning Services; Special Collections and University Archives; and User Services

and Resource Sharing. The expectation was that members would bring their individual expertise

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[1] Consortial Library Applications and Support (CLAS) manages the catalog and databases for UMD and the University System of Maryland.

to the group and represent the views and interests of their colleagues and, if applicable, user groups. The representative from Research and Learning Services, for example, was expected to communicate with other subject specialist librarians and make sure their concerns, and the concerns of the academic departments they serve, regarding the disposition of specific collections, were represented. With the exception of one co-chair, however, who had been intimately involved with a project to move materials to remote storage fifteen years earlier, none of the members had any direct experience with the kinds of decisions the group was asked to make; this lack of experience would have ripple effects throughout the project.

Phase 2: Project Definition and Planning

The goal of the Project Planning stage is to develop comprehensive documents to guide the project group's activities and allow for control over timelines, outcomes, and resources. It includes formal definition of the project through a Scope Statement, and related documents/plans including the work breakdown structure (defining the parts of the project), roles and responsibilities (who will be responsible for which tasks), project schedule (how long will tasks take and by what deadlines must they be completed), project budget (how much will it cost), and control plans and processes (how will the group handle problems, questions, and interruptions to the plan) (Heagney, 2016, p. 39-39).

The group immediately ran into a problem with defining its scope with the first task, identification of library collections to send to Severn Library. The charge made it clear that the group itself would have no authority to make the final decision on this task, which would instead be made by the Associate Dean for Collection Strategies and Services in consultation with another decision-making body, the Collection Development Council. The Working Group felt great discomfort about suggesting selection criteria, given that only two members had any direct

collection development responsibilities. After extended discussion, the Working Group and the Associate Dean decided that this task was out-of-scope; the Collection Development Council would work on the overarching vision and selection criteria for materials to be moved to Severn, while the Working Group would stick to more prosaic concerns like planning the logistics of moving 500,000 volumes from the existing storage facility. While including collection development in the scope and then removing it had little effect on the process of creating a collection development policy, ultimately, doing so contributed to the feeling of chaos that plagued the early parts of this project.

Other planning steps were more straightforward, but would have benefited from a formal project management approach. The group generated an initial schedule of work and list of milestones (see Appendix A), which was altered frequently as the project progressed, due to a combination of shifting administrative priorities, unclear communication, and the limited experience of the group members with a project of this size and complexity. The group did not create a formal "work breakdown structure" or "roles and responsibilities" documents. Project definition and planning were useful only insofar as the project team established tasks that needed to be accomplished (and ultimately were). However, the establishment of a realistic timeline was hampered due to a lack of input on exactly what the tasks were and how long each would take. Likewise, the group did not create a proper Gantt chart or a corresponding plan for risk management, which could have illuminated and thus helped prepare for some important project dependencies (for example, accurate shelving specifications were a must for several key decisions, and their delay created major problems).

The process of developing the work and milestone schedule made it apparent that the larger Severn Library project would actually be made up of multiple, smaller projects, including:

- Developing an inventory database and control system as well as a system for shelving and retrieving materials;

- Developing a Request for Proposals (RFP) and contracting a moving company to relocate 500,000 volumes from an existing storage facility to Severn Library;

- Determining needs for book storage trays, developing a second RFP for these items, and ordering the appropriate quantity of trays;

- Ordering furniture, electronics, and other equipment, including materials handling machinery ("orderpickers") with their own logistical complications; and

- Developing a service model and staffing plan, and preparing long-term budget requests to operate the new facility.

Group members were assigned to tasks based on the unit they represented and any prior experience with various phases of the project. Staff from Consortial Library Applications and Support, for example, were assigned the task of researching options for the inventory control system; the Preservation librarian took on the job of investigating potential moving companies and developed a list of requirements that informed the official RFP. For three of the five sub-projects above, however, there was no member of the group who possessed the necessary expertise or experience, leading the group to learn and adapt. The group did establish a formal Communication Plan, which involved bimonthly updates to the Associate Dean for Collection Strategies and Services, the use of Basecamp for online discussions and to-do checklists, Box for file storage and sharing, and an email list for regular communications. The communication tools (particularly Basecamp) proved a poor fit as the size of the group that actually managed the project shrank. However, the authors used Box for file storage, which was quite effective.

Phase 3: Launch and Execution / Phase 4: Control and Evaluation

With the initial project definition and planning underway, the project moved into the Execution phase. Saladis and Kerzner describe some of the actions that occur during execution generally:

> The assigned resources are obtained, engaged in the project and begin to perform their specific project activities. Procurement activities such as RFP submissions and seller selection begin and contracts are negotiated. As work is performed, results will be produced that must be analyzed. The project manager obtains status from the project team and tracks performance against the plan. Status reports are generated as described in the communications plan… Issues are raised by the project stakeholders and are analyzed for impact on the project, and solutions are developed (2009, p. 41).

Although the Control and Evaluation phase is a separate step in the project management process, in reality it overlaps considerably with the Execution phase. In Control and Evaluation, the project manager monitors the progress on the sub-goals of the project, manages scope, time, human resources, costs, and quality, and constantly compares them with the project plan, making adjustments as needed. The change control process provides a framework for the project manager to assess needed and/or recommended changes and incorporate them into the project plan, if appropriate (Heagney, 2016, p. 147). The authors will discuss both phases together here, to reflect the fluid nature of the Severn Library project.

The Severn Library Working Group attempted to use the initial milestone schedule to guide its work, but experienced continual problems with communication and clarity of direction from the administration and with communication from campus projects personnel. For example, the group needed detailed shelving specifications to determine both the total capacity of the new facility and the quantity of book trays that would be needed, yet those specifications were delayed by months, which in turn delayed the Request for Proposals for book trays. Likewise, the

shelving specifications were necessary to determine the required specifications (maximum width and turning radius and minimum height) for the orderpicker, so the delay in receiving the specifications delayed the order of this critical piece of equipment and led to other problems.

Soon after the Launch and Execution phase began, it became clear that the Working Group model was not an efficient way to accomplish much of the detail-oriented work required for the project, or to efficiently monitor and control the project as a whole. If anything, a loosely-connected group of team members with only tangential interests in the finished project made it more difficult to make decisions and hit deadlines. The Working Group met in February, March, and May 2015, and toured two local high-density storage facilities in May 2015, then did not meet again (and for the last time) until the following August. In its place, two members – the Director for User Services and Resource Sharing and the Coordinator for Collection Maintenance, the authors of this chapter – took on the bulk of the work, and called on other individual Working Group members when their expertise was needed. This approach allowed for flexibility and the ability to pivot between several simultaneous projects while saving other group members' valuable time; however, it also placed a great strain on the two project leaders who had to coordinate and accomplish a large volume of work in a relatively short time. To demonstrate the successes and failures of this "accidental project manager" approach, the sections that follow will focus on three key tasks: creating the Severn Database for inventory control; contracting with professional movers to relocate 500,000 volumes to Severn; and ordering furniture, electronics, and equipment.

Severn Database

One of the more complex tasks in a project full of complexity was creating an inventory control system for the new Severn Library. Early in the project, it was clear that there would not be

sufficient funding to purchase a commercial inventory solution such as Generation Fifth

Applications (GFA). As a result, the Libraries would need to develop one or find a way to adapt

the existing system, the Maryland Off-Site Storage (MOSS) Database, which had been

developed in-house in 2005.

The Coordinator for Collection Maintenance took ownership of this particular project

sub-goal, collaborating with the Working Group staff members from Consortial Library

Applications and Support. After investigation, they decided to repurpose the existing MOSS

Database for Severn Library. This relational database, renamed the Severn Database, only holds

a limited amount of metadata for each item held in off-site storage, and syncs with ALEPH, the

Integrated Library System, nightly. During each synchronization, the database acquires the

metadata for any new items that have been transferred to the off-site storage location in ALEPH

and downloads the requests for any items on hold in Severn. The process of investigating the

existing database closely models Phase 1 in the project management steps. We discovered that

the existing database has immense "value to the organization" as the work of building the

database had occurred twenty years before, and to continue to use it would expend as few

resources as possible.

In order to use the existing database, it needed to be updated to reflect the new use and

context. The Coordinator for Collection Maintenance first consulted with the supervisor of the

existing offsite facility (the Library Service Center, where the University Libraries had leased

storage space from Johns Hopkins University Libraries since 2005) to learn how to use the

Severn Database and to manage an off-site storage facility. This meeting turned into a consulting

session as well, in which the Coordinator and supervisor developed a list of changes that would

make the database more useful. The Coordinator then met with a manager and a programmer

from Consortial Library Applications and Support to explain the changes and discuss their feasibility. Only the manager was a member of the Working Group, but only the programmer had the expertise to make the changes. The programmer then worked independently to accomplish the database changes, communicating to the manager and the Coordinator for Collection Maintenance when questions arose. Little time was spent in Phase 2 of this part of the project, as discovering ways to improve the database were at first incidental to learning the essentials of storage facility operations.

By consulting with the current user of the database and collaborating with the programmer who had built it, neither of whom was a member of the Working Group, the Collection Maintenance Coordinator and the programmer were able to create and execute a plan to prepare the system for a new use case. In the end, this process was successful in creating a more robust, efficient inventory system, but it required the initiative of a single project group member and active problem-solving by the consulting stakeholders, whose work took place largely outside of the confines of the Severn Library Working Group.

The Big Move

One of the most daunting, yet ultimately successful, parts of the Severn Library project was the move of materials from Johns Hopkins University's Library Services Center to Severn Library. The success of this part of the Severn Library project was due to the control and preparation the authors were able to exercise, including writing the Request for Proposals for movers, vetting the proposals, planning the move with the successful bidders, and participating in the move with some strategic participation by members of the Working Group.

Due to the size and expected cost of the move, the University required a formal Request for Proposals (RFP), which was drafted by several working group members including the

authors, the Head of Preservation, and Director of Technical Services (the latter two of whom had experience with contracting movers for previous projects.) The RFP specified that the Libraries were looking for a company to move 500,000 volumes in 33,000 trays from the Hopkins facility to Severn Library (a distance of approximately eighteen miles) while maintaining the integrity of the metadata. The RFP detailed a procedure for the move, which was substantially altered upon consultation with the winning bidder. The authors of this chapter, along with a senior administrator from the Libraries, carefully reviewed each eligible proposal and selected one, which was the only proposal to meet all of the criteria established by the RFP. Not coincidentally, it was also the most thorough of the proposals. The reviewers were particularly impressed by the company's quality control plan, which specified a full day each week for assessment and error correction. The detailed RFP, and resulting careful selection of the contractor (this project's Phase 2), allowed the rest of the move to succeed. With a less careful evaluation, and a less qualified mover, the result could have been disastrous.

Working with the Severn Database administrator, the Project Manager from the moving contractor, and the head of the Hopkins Library Service Center, the authors created a new and simpler workflow than the one initially specified in the RFP. Movers pulled trays from the shelves at Hopkins, put them on carts in order, and transported them in trucks to Severn Library, where they were scanned and re-barcoded before shelving. The movers scanned and recorded the old barcode, new barcode, and whether or not the tray was full (scanning one barcode for "Yes," a different barcode for "No"). The resulting data was checked each week for errors, and each tray was spot-checked to make sure the physical locations matched the locations in the database records. At the end of the week, the project manager sent the spreadsheet to the programmer from Consortial Library Applications and Support who administers the Severn Database. He

batch-updated Severn Database records for trays which had been relocated. Along with careful planning, this expertise made the Execution and Control (Phases 3 and 4) of this project go smoothly.

During the move, the authors were able to leverage the expertise of both the Project Manager at the moving company as well as colleagues from the University of Maryland and Johns Hopkins University. This ability to consult both internal and external experts improved the project immeasurably. Consortial Library Applications and Support offered suggestions on how to develop the process of changing the metadata in a way that would work with the Severn Database and provided computers and scanners for the movers to use; the supervisor at the Hopkins Library Services Center and the Project Manager at the moving company helped with their knowledge of what had been successful in other projects. Working with these colleagues, who were not stakeholders in the final product and were not members of the Severn Library Working Group, helped to ensure the process was as effective and efficient as possible.

Ordering Equipment and Supplies

Perhaps the most uncertain part of the project was that of ordering furniture, technology, and equipment for the new facility. Early on in the project, before the Working Group was formed, the Director of User Services and Resource Sharing (USRS) was called to attend a Severn planning meeting with representatives from campus Facilities and Project Management, handed a blueprint for Severn Library, and asked to supply a complete list of furniture, technology, and equipment for approval, complete with vendors, model numbers, specifications, and prices. Without a clear idea of how the facility would be staffed, or even the number of volumes it would hold, this was a difficult task. It required significant research, querying email lists and colleagues, and contacting vendors to find the appropriate models for everything from chairs and

work tables to overhead scanners and a four-ton orderpicker. A few months after the complete equipment list was approved, the Director of USRS was given a budget of $270,000 and told to start ordering.

While some of the research phase could be and was delegated to others, the nature of the work of purchasing was such that one individual, the Director of USRS, had to take charge of it from start to finish, using a spreadsheet to track items to be ordered, deadlines, and costs. In the end, the ordering of equipment and supplies did not follow a linear project plan of Conception, Planning, Execution, Control, and Closing. Instead, it was an iterative process where each set of equipment or supplies to be ordered, such as computers, scanners, or the orderpicker, was its own little project in itself: the research and decision-making phase (Phase 2) was the most difficult and laborious, and the actual execution of purchasing only involved submission of a requisition form.

The simplicity of Phase 3 is true of all equipment except the orderpicker, which proved to be one of the most difficult challenges. First, due to the aforementioned delays with the shelving specifications, it was difficult to get an accurate quote for the machine, since the price is dependent upon the total height of the raised platform; that is, an orderpicker that can reach to only twenty-five feet costs less than one that can reach to thirty feet. Once the machine was finally ordered a second major problem was discovered: the architects and building project managers did not consider the size of the equipment that would be needed to retrieve trays from thirty-foot shelves when they designed the building. As a result, the entrance to the book storage area in Severn Library was not large enough. The orderpicker would fit through the doorway, just barely, but did not have enough clearance to make the turn into the first aisle. After much consultation and hand-wringing, the solution was devised to remove and relocate (at a significant

cost) two units of shelving, thus creating just enough clearance for this essential piece of equipment to be delivered. The situation could have been avoided by involving the appropriate stakeholders earlier in the process and providing them complete and correct shelving specifications, so that those stakeholders could have selected the appropriate equipment and ensured that the architects provided ample room for it to be delivered.

Creating the Severn Database, the initial transfer of 500,000 volumes to Severn from the existing storage facility, and filling the new library with furniture, technology, and equipment exemplify the success that can be found in accidental project management. The authors took ownership of these sub-projects, created a plan in which they asked for assistance from experts, and executed the plans. Success was not based on intentionally following project management principles but rather shows how project management principles are logical and methodical ways to accomplish a goal.

Phase 5: Closing

The final phase of project management, Closing, is often overlooked or hurried but is just as vital as the other stages (Heagney 2016, p. 199). Typically, it involves completing a "punch list" of unacceptable items that need correction (bug fixes, for example), finalization of contracts and open accounts, closing reports to customers or stakeholders, reviews of "lessons learned," and recognition of project team members (Saladis and Kerzner 2009, p. 42-43). In this case, the punch list involved final walking tours of the facility to document all features not up to expectations that the construction contractor needed to correct, and recognition came in the form of an opening reception at the facility in early 2017. However, after opening Severn Library on time, the authors did not take a moment for a formal closing phase. In fact, the authors have

found that writing this chapter has served as a project post-mortem of sorts, allowing the project managers to find some coherency in what felt like a chaotic and disjointed process.

CONCLUSIONS AND LESSONS LEARNED

Ultimately, while this was a successful project (in that it met the goal on time), it is not a purely successful example of project management. Unsuccessful elements include the project group dynamics, lack of leadership, and lack of formal planning or risk assessment processes. Despite the employment of some project management tools, this project did not really take off until Phase 3, where the large-scale project team gave way to the work of two individual "accidental" project managers. The authors were then able to lead the subprojects that were at the core of accomplishing the ultimate goal of opening Severn Library. Other lessons learned:

- First and foremost, a project of this magnitude absolutely requires a single project manager with formal project management experience and expertise. Co-chairs do not work as well as a single leader with the authority to assign work and push deadlines.

- Choose project team members carefully, and do not hesitate to remove or replace them if they are not appropriate for the work. The group that begins a project may not necessarily be the same group that completes it.

- Project team members need to be empowered to take ownership and be full participants in the process, but they need real expertise in order to do so. "Representation" is not the same as expertise; including project team members solely to represent certain constituencies, without regard for the knowledge or skills they actually bring to the project, is unproductive.

- A clear charge and scope of work is a necessity. The charge should describe what decisions the project team can make, as well as what needs approval outside of the group.

If the team is unclear on where its authority begins and ends, it is difficult to make effective decisions.

- Spend some time early in the process building an identity for the project team. Why are you working together? What skills and expertise do individual members bring to the table? This may not be necessary at smaller organizations, or where people work together frequently, but when a project team is large or made up of disparate members from all across the organization, building team cohesion is an important step.

- Formal project management techniques can be helpful, but are not ends in themselves. A Gantt chart or risk assessment may help you identify problems before they come up, but may or may not enable you to avoid them. A formal Work Breakdown Structure, with clearly assigned roles and responsibilities for all team members, is highly recommended.

In the final analysis, the Severn Library project was ultimately successful despite a lack of formal project management. The authors were ultimately able to succeed as "accidental project managers" but would have benefited greatly from the judicious application of project management principles, tools, and techniques.

APPENDIX A: INITIAL PROJECT TIMELINE

Feb 24, 2015 – Initial meeting of SLWG

ASAP - Campus projects supplies SLWG with appropriate floor plans and specs for Severn

Mar 31, 2015 - SLWG identifies preliminary selection criteria for General Collections to be

transferred to Severn. Criteria passed to Collection Development Council for full

development and implementation.

Apr 30, 2015 - Collection Development Council finalizes selection criteria and instructions for

Subject Selectors

Apr - Oct 2015 - Subject Selectors weed and identify materials from General Collections to be

transferred to Severn. Deadline: Oct 31, 2015

May 29, 2015 - Status Report Due

Jul 31, 2015 - Status Report Due

Sep 1, 2015 - MOSS weeding and de-duplication completed.

Sep 1, 2015 - Identify and procure inventory system in alignment with projected

operations/service model.

Sep 25, 2015 - Status Report Due

Oct 1, 2015 - Floor plan and shelving layout finalized

Oct 31, 2015 - Plan for moving collections from Hopkins Library Services Center (MOSS) to

Severn completed by SLWG and approved by Assoc. Dean.

Oct 31, 2015 - Plan(s) for moving Special Collections from Hornbake/Virginia storage facility to

Severn completed by SLWG and approved by Assoc. Dean.

Oct 31, 2015 - Plan for moving general collections from UMD Libraries to Severn completed by

SLWG and approved by Assoc. Dean.

Dec 4, 2015 - Status Report Due

Nov 30, 2015 - Finalize plan for personnel and operations/service model. Requests for new

positions approved by Resources Group and campus.

Nov 30, 2015 - Contractor(s) selected for move of collections from MOSS, Special Collections

Offsite, General Collections, and Special Collections.

Nov 30, 2015 - Configure inventory system to align with operations/service model and move

into production.

Jan 8, 2016 - Status Report Due

Mar 15, 2016 - Facility inspected and handed over to Libraries' administration

Mar - Apr 2016 - Facility environment monitored by Preservation staff

Jan - Mar 2016 - New personnel interviewed and hired / Existing personnel transferred

Apr 15, 2016 - Facility environment approved by Preservation staff for receipt of collections.

Mass moving of collections to Severn begins in the following order:

- Hopkins LSC (est. timeline: 4 weeks)

- Special Collections Offsite (est. timeline: ?)

- General Collections (est.timeline: ?)

- Special Collections (est. timeline: ?)

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