Notes on Operations

Letting Go

Closing a Branch Library of the Health Sciences Library System, University of Pittsburgh

By Leslie Czechowski, Renae Barger, Malgorzata Fort, and Gretchen Maxeiner

Closing a branch library is a complex and often a painful activity, but one that libraries frequently face in difficult economic times. This case study examines a project that closed a branch library in an academic health sciences library system. The authors describe the sequence of steps followed, challenges encountered, and solutions implemented to complete the project. The authors document lessons learned that can benefit other libraries faced with a similar situation.

In the fall of 2008, the administration of the Western Psychiatric Institute and Clinic (WPIC) informed the Health Sciences Library System (HSLS) at the University of Pittsburgh (Pitt) that it would have to make extensive budget cuts in the collection of its library, one of four libraries the HSLS manages. In early December, after a few months of planning for space and budget reductions, the WPIC administration notified the HSLS director that WPIC Library instead would close permanently at the end of the semester. The HSLS received no reasons for the decision. Some staff positions were terminated and others retained for a few months to aid in the disposition of the collection, which was planned for completion by the end of the spring. Begun in 1942, the WPIC Library had built a comprehensive collection in psychiatry and the behavioral sciences. The HSLS staff were devastated with the decision yet had no choice but to plan to dismantle this outstanding collection.

This paper is a case study on closing a departmental or branch library that is part of a larger academic library system. The library's collection was specialized, and the largest portion was unique within the system. This paper describes the planning phase, processes developed, activities, and results of the work. The authors, who served as project managers, document lessons learned that could benefit other libraries faced with a similar situation.

Literature Review

Because the HSLS had so little time to plan for closure of the WPIC Library, project managers did not take the time to review the library science literature, but they would have benefitted from doing so. Many relevant articles on the subjects of moving libraries to different spaces, merging branch libraries into the main library, and closing libraries have been published. Two articles relate to merging libraries. Lessin's article, a more theoretical, historical discussion, is aimed at helping library managers guide decision-making; it is not a step-by-step discussion of the process.[1] His is a positive response to the potentially negative action of merging libraries. He reminds his readers that patrons may not be happy with such decisions, but the

Leslie Czechowski (lczech@pitt.edu) is Assistant Director of Collections and Technical Services, **Renae Barger** (rbarger@pitt.edu) is Head of Access Services, **Malgorzata Fort** (gosia@pitt.edu) is Head of Technical Services, and **Gretchen Maxeiner** (maxeiner@pitt.edu) is Cataloging Librarian, all at the Health Sciences Library System, University of Pittsburgh, Pennsylvania.

electronic environment provides access to literature regardless of the physical location of materials, especially in a library that provides information in science, technology, and medicine.

The librarians at the Ebling Library at the University of Wisconsin-Madison knew two years beforehand that they would be merging three health science library collections into one.[2] They had the time to carefully plan for the move with input from staff throughout the libraries. They could take the time to reclassify one collection before the move, spend a year to perform a title-by-title assessment of the journal collections, and carefully mark shelves in the new building so that the moving company could know where to place the bound journals. The authors note the importance of communication to library staff and patrons as the move was taking place—a recurring theme in articles addressing moving, merging, or closing libraries.

At the Memorial University Medical Center in Savannah, Georgia, the library was moved at the recommendation of the librarian.[3] They had time to plan the new space to suit their needs, but did face some challenges with the actual move. Their experience highlights the fact that although each library's issues and challenges are unique, problems will necessarily arise when moving, merging, or closing a library. Croneis and Short present results of a survey regarding the addition, closing, or merging of branch libraries at Association of Research Libraries institutions.[4] The data relating to library closures parallels the activities at the HSLS: Collections were merged with other collections, vacated space was taken over by the academic department, and services were moved to another location.[5] Croneis and Short also note that the impact of electronic resources was significant in more than half of the responding institutions, a situation all too familiar in academic libraries in the twenty-first century.[6]

Atkins and Kruger present an array of data concerning the management of large projects in libraries, including the moving of a library.[7] They note a lesson learned that reflects what other authors have stated. Staff, communication, and planning are vital components of large projects of any type.

Few articles discuss the actual closure of a library. Two older articles by Griffin and Sheridan discuss the disposition of an entire collection when a college closes.[8] Cohen describes the relocation of the Engineering Societies Library.[9] Pearlstein and Matarazzo's discussion of the closure of a corporate library resonates with the situation at the HSLS because the decision was made at the top, with no input from staff. However, they do not discuss the process of closing the library.[10] Davidson discusses moving a science library into the main library at Augustana College, an integration that was part of the planning for a new central library.[11]

Johnson's detailed article about closing a branch library on a university campus highlights many issues similar to those faced by staff at the HSLS.[12] The University of Minnesota Libraries (UML) had to close their branch library at the Museum of Natural History in 1992 because of budget constraints. They had numerous duplicates in the journal collections and transferred only unique titles to the recipient library. UML had to use existing staff, although they were able to hire a few extra staff members when the library realized the process could not be completed otherwise in the time available. Problems they faced included making decisions on the basis of available shelving space and reprocessing considerations. Johnson's article is too brief to include extensive details of their planning, processes, and results.

The article that describes the closing of the chemistry library at Louisiana State University (LSU) also presents many issues faced by the HSLS.[13] Staff at LSU had only one semester in which to plan and move the library and needed to find space in both the main library and storage for monographs and bound journals. Collection weeding was required. Both the HSLS and LSU had to plan for the integration of a portion of the specialized collection into the regular collection. Each library made different decisions because of unique circumstances. For example, LSU needed to reuse shelving and used their Facility Services staff and student workers to move materials. Armstrong notes that planning, cooperation, and efficiency were central to their success, as do the authors of the present paper.

Background

In most respects, the HSLS is an independent library system at Pitt. It shares the same Voyager integrated library system (ILS) and cooperates in purchases of numerous electronic resources with other university libraries. The director of the HSLS reports to the senior vice chancellor for the health sciences, a separate reporting structure from the other Pitt libraries. The HSLS has fifty-four staff (twenty-three faculty librarians and thirty-one support staff). Technical services are centralized in Falk Library. The libraries have 266,645 print volumes shelved in the libraries with an additional 140,299 volumes in off-site storage. The collection contains 406,924 non-print materials, 437 print journals, and 199,857 print monographs, and it provides access to 2,838 e-books. HSLS subscribes to ninety databases and more than 4,000 electronic journals.

At the time of the closing, the HSLS had four libraries. The main library, Falk Library, serves the academic needs of the six schools of the health sciences at Pitt and clinical needs of a group of hospitals contiguous to Pitt's main campus. The WPIC

Library was the other academic/clinical library, located across the street from Falk and connected by an underground tunnel (a situation that proved invaluable during the move). Two of the University of Pittsburgh Medical Center (UPMC) hospitals have libraries that are part of the HSLS: Children's Hospital of Pittsburgh of UPMC (CHP) and UPMC Shadyside Hospital. UPMC had eighteen facilities at that time; the HSLS provides access to licensed electronic resources for all of UPMC.

WPIC Library became part of the HSLS in 1995. Since its formation, it had been an independent library with a general academic and medical collection and a focus on psychiatric literature and related specialties. Because of differing cataloging practices before WPIC Library joined the HSLS, technical services staff were never able to get an accurate tally of exact numbers in the collection. However, before the closure, as far as the authors could ascertain, WPIC Library contained 44,597 monographs, 4,627 audiovisual items, and 1,476 periodical titles (with approximately 29,000 bound volumes). Although a majority of the collection was unique within HSLS, some of the collection was duplicated in other HSLS libraries. The WPIC Library had general reference titles (dictionaries and directories), general medical textbooks (for example, *Harrison's Principles of Internal Medicine*), numerous journals such as the *New England Journal of Medicine* and *Science*, and monographs in related disciplines such as psychology and education. In addition, some part of the collection overlapped with collections in other university libraries. One difference between the WPIC Library and the rest of the HSLS was that the WPIC Library had used the National Library of Medicine (NLM) Classification since its inception while all other HSLS libraries use the Library of Congress Classification.

Planning Process

Planning began immediately upon learning about the decision to close. The planning was initiated and accomplished by the authors of this paper, who served as managers of the project. They were the assistant director for Collections and Technical Services, head of Access Services, head of Technical Services, and the cataloging librarian. Initial policies were based on

- the desire to retain the core of the psychiatric collection;
- limited space in the main HSLS library, Falk Library, and in the off-site storage facility;
- the need to discard items duplicated in other HSLS libraries (and in some cases at other Pitt libraries); and
- limited time in which to complete the project.

Major decisions at this point guided the authors' work during the project. Among other issues, they decided to

- refrain from reclassifying any materials except when absolutely necessary;
- avoid reprocessing (new spine labels, for example);
- tattle-tape the books that would move to Falk Library (the two libraries used different security systems); and
- refrain from scanning barcodes of books packed for transfer to off-site storage.

In early January 2009, the HSLS executive committee approved the policies for moving the WPIC collections (appendix A). The HSLS had complete latitude in making decisions regarding the collection, and there was surprisingly little outcry from faculty to influence policies.

The discrete sections of the collection (audiovisual, reference, consumer health, circulating, periodical, and historical) were placed in priority order for moving on the basis of use as reported by the WPIC Library staff, availability of space in Falk Library, and complexity of integration. The project managers created a timeline for the project (appendix B), revising it during the process. Although the HSLS originally had agreed with the plan of the WPIC Library administration to finish by the end of March, other HSLS projects were in place that also required the work of the same HSLS staff. During this period the HSLS also was faced with the move of the CHP Library to a new building and the temporary move of Falk Library's rare book collection because of the installation of a new heating, ventilation and air conditioning system. A new deadline of May was arranged, allowing approximately five months for the project.

Several key decisions proved to be invaluable:

- A project team was created by the HSLS executive committee that included the four planning librarians and other staff who would be involved: Falk circulation staff, serials' cataloging staff, and the WPIC Library staff that were retained temporarily. The charge to the project team was to plan for and execute the move of the WPIC materials as quickly as possible.
- The team met weekly to assess progress, discuss problems and issues that had arisen, and plan for the coming week's work. This proved to be important because project team members were working on different portions of the collection simultaneously. The work of the cataloger, for example, directly affected the work to be done by the WPIC Library staff in the coming week.
- The project manager made minutes of each meeting available

to all of the HSLS so that staff—especially in public services—would have up-to-date information about the location of materials.

• The HSLS document delivery services maintained access to the WPIC print collection. The HSLS normally charges a fee for document delivery, but because HSLS patrons were being inconvenienced by the lack of direct access, the HSLS instituted a temporary procedure to deliver books and article copies from the WPIC collection to HSLS patrons at no charge. During the first four months of the project, the service transferred 191 books from the WPIC Library to another HSLS library for patron use, and scanned and delivered 169 articles to patrons electronically. Only one request had to be ordered via interlibrary loan because it could not be easily located on the WPIC shelves. All requests were filled within two days.

Staffing

As the project managers started this project, they were able to pull staff members in many departments and facilities away from their regular duties to assist with the work. Circulation staff and a staff member in reference services helped by searching the catalog to determine whether copies of WPIC titles were available elsewhere at Pitt. The WPIC administration agreed to provide funding for staff during the transition period, so the HSLS was able to retain two WPIC Library staff members for most of the project and add extra student workers. A former WPIC Library reference librarian and book selector who had been transferred to Falk Library consulted with the project team throughout the project. Regular
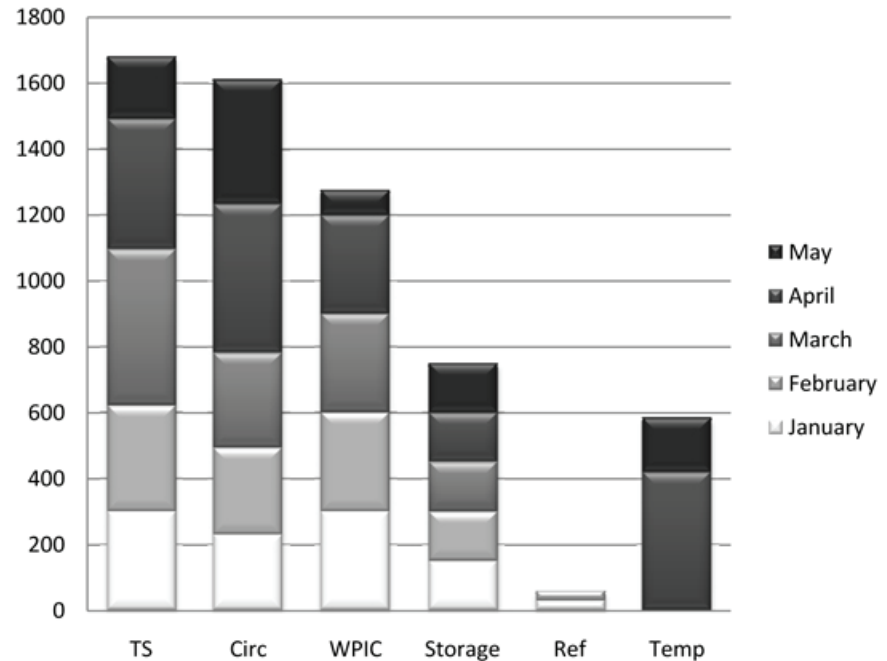
TS: Technical Services staff; **Circ**: Circulation staff; **WPIC**: WPIC library staff retained for the project; **Storage**: Staff at the off-site storage facility; **Ref**: Reference staff; **Temp**: Temporary staff

Figure 1. Staff Time in Hours

staff in Technical Services, Circulation, Document Delivery, and the off-site storage facility put aside regular duties to do the work of the move, and other staff not directly involved had some responsibilities shifted to provide release time for dedicated project members. Finally, the budget allowed the HSLS to hire temporary workers to do the final move and tattle-tape of WPIC books and journals being transferred to Falk Library.

The involvement of individual staff members fluctuated depending on where the project team was focused at a particular time. With monographs, for example, the Technical Services staff initiated the work by creating lists of targeted segments of the collection and identifying the disposition of the items; WPIC Library staff, Falk Library circulation staff, and students packed and marked books; off-site storage staff received books sent to storage; and cataloging staff updated location

information in the ILS. See figure 1 for the amount of time spent by staff in various departments. The table illustrates the amount of time (815 days or more than 6,000 hours) devoted by five departments and the temporary workers. The largest contributions are the equivalent of 209 days (1,672 hours) by Technical Services and 200 days (1,600 hours) by Circulation staff, followed by carry-over WPIC staff, storage staff, and temporary staff. Reference staff had very limited involvement—only three days (26 hours). At first, project leaders were disappointed that the budget was insufficient to hire commercial movers to transfer materials to Falk. However, the HSLS was able to hire three temporary staff who, perhaps because they were recommended by the HSLS staff and had some knowledge of libraries, proved to be excellent workers. They worked during off hours when the elevators and corridors between libraries were less busy.

Because moving books was tedious, the temporary staff made competitive games of moving the books; they did it quickly, accurately, and with some level of entertainment.

Audiovisual Collection

The WPIC Library had amassed an impressive variety of audiovisual materials, including many unique items, such as recordings of lectures and conferences sponsored by the institute. Some types of materials were used more than others, so the project team members broke down the collection by medium and assigned priorities for attention accordingly. The team quickly learned that that the way in which data had been treated in the ILS affected decision-making. In this case, all WPIC audiovisual materials had a single location code, so making global changes in data in the ILS for portions of this collection was challenging. The solution was to scan sets of barcodes and then process those in the ILS.

The top priority was the WPIC videocassette collection, which was both large and heavily used. An outdated slide collection was discarded to create a separate space for these in Falk Library, thus they did not have to be integrated immediatley into the Falk audiovisual collection. Unfortunately, this space is outside the public area, so library staff must retrieve videos for patrons. However imperfect the solution, it bought time. The HSLS was able to postpone the reclassification of the WPIC videotapes (which would be necessary in order to interfile them into the Falk collection) yet still make them available for patrons without delay.

The collection of DVDs and CDs also was heavily used but much smaller. This group was reclassified, reprocessed, and incorporated into appropriate sections of the Falk audiovisual collection. Finally, audiocassettes were moved to storage and made

temporarily unavailable pending evaluation. A future project will identify which audiocassettes are historically significant and should be migrated to different media; those for which no demand exists will be discarded. Availability of funding for reformatting also will be a consideration.

Consumer Health and Reference Collections

Consumer health librarians at two other HSLS libraries selected 165 WPIC monographs on consumer health to be reprocessed for their collections. Books not selected were withdrawn from the catalog and left on the shelf. Staff from the Carnegie Public Library of Pittsburgh were invited to take any of the remaining consumer health books for addition to its collection.

The reference collection was to be moved to Falk Library. Reference services for WPIC patrons had already been transferred to Falk, so moving the collection was a priority. A separate shelving unit was installed in the Falk reference area so that the WPIC reference collection could be kept apart from the Falk materials. This decision again eliminated the immediate need for reclassifying the WPIC materials. Librarians also believed a distinct psychiatric reference collection would ease the transition for staff and patrons in the short term. Perhaps of most importance, project staff did not have the time to select, reclassify, and integrate the psychiatric reference books into the Falk collection. Because of the limited amount of space available in the Falk reference area, only a portion of the WPIC reference collection could move as reference materials. The former WPIC selector recommended which psychiatry titles should move to Falk Library; the selector for the Falk reference collection and the assistant director for Collections and Technical Services decided which of the remaining titles would be moved

into the circulating collection or withdrawn.

Circulating Collection

The circulating monographs proved to be one of the most challenging parts of the collection. This was the largest segment of the WPIC Library, and to retain the most important books the authors employed a number of strategies, some successful and some not. To narrow the circulating collection to its core materials, several types of books were targeted for transfer or removal: duplicates (1,500 titles), foreign language (866), previous editions (2,727), and books with zero circulation (14,116 books published before the year 2000 that had never circulated). Reports were run from the ILS on each of these groups of books, and, to keep staff as busy as possible, the project managers tried to work on them simultaneously. During the entire monograph (and bound journal) project, all withdrawn items were processed in the ILS and physically marked as discards, including a black "X" across the spine label for easy recognition; they remained on the shelves in their original spot.

First, the project managers decided to withdraw the majority of the books that were duplicated within the WPIC and in other HSLS libraries. The HSLS did not have space for all of the WPIC books, and withdrawing duplicates was logical. Staff started this project in October, even before the decision to close the WPIC library was made. The project was completed by late January.

At the same time, the foreign language books were being evaluated. Because the HSLS collection policies state that books in languages other than English are not collected, the staff decided to withdraw foreign language books that are held in more than six libraries in the eastern part of the United States. Staff assumed that if a

patron needed one, it could be easily obtained via interlibrary loan. The foreign language books that were retained because of their relative uniqueness were transferred to the HSLS off-site storage in February.

Staff started pulling earlier editions of standard texts for removal to off-site storage because initial projections suggested that Falk Library would not have space for them. However, the identification of early editions in the ILS proved to be unexpectedly time consuming. As the end of February drew near, staff discontinued this project, retaining the earlier editions with the collection to be moved to Falk. The largest group of circulating materials—books with zero circulation—was divided into two treatments: Those held in other Pitt libraries would be withdrawn, and the rest would go to off-site storage.

As the staff began withdrawing books with zero circulation that were held at other university libraries, a former WPIC librarian expressed concern about breaking up this unique psychiatric collection; there are few American libraries with such a rich collection. The HSLS executive committee reconsidered on the recommendation of the project managers and adopted a revised policy stating that the HSLS would withdraw books with zero circulation in all NLM classifications except for WM (Psychiatry). The psychiatric books would be retained, even if a Pitt library also held a copy.

As staff worked with the monographs, the project managers questioned whether such a careful, title-by-title analysis of the monographs was wise. The plan had been to preserve the best of the collection given space constraints, and time to do so was provided. But was it a good use of time? The project managers ultimately decided that it was because the core psychiatric literature that had made this such a rich collection was retained. Other libraries may not have the space and time to follow this course.

Keeping all of the withdrawn items in order on the shelves left open the option of offering the books to other libraries or used book vendors after the project was completed. By the end, however, the press of other work—set aside while staff focused on this project—made returning to the WPIC collection impossible. Thus the remaining withdrawn books (and journals and shelving) were given by the WPIC administration to a company specializing in collecting and recycling used library materials for other libraries. The portion of the circulating collection to be retained was moved to an empty, distinct section of shelving in Falk Library, space made available because of a recent move of older bound journals to storage. The temporary workers and library circulation staff moved books from the WPIC to Falk Library cart-by-cart through elevators and tunnels. The books are now designated as the Psychiatry Collection in Falk Library, and will remain separate until time and space are available to reclassify and integrate them into the rest of the Falk circulating collection.

Periodicals

The complex procedure of evaluating and moving the bound periodicals took more than four months. The driving force in the decisions regarding the bound periodicals was the space available in Falk Library. Circulation staff carefully measured existing shelves to determine how many volumes could be added to the Falk collection, and then the head of Technical Services decided which volumes should be moved. The periodical holdings were evaluated in two different groups: titles duplicated within the HSLS and titles unique to the HSLS. A goal was to eliminate the duplication of holdings between the HSLS libraries, so duplicate volumes in the first group were withdrawn. Unique titles were assessed to trim the

collection further by removing newsletters, some periodicals that were out of scope (mainly nonpsychiatric titles in psychology, education, and medicine), and periodicals with scattered holdings or duplicates somewhere else on campus.

Project managers decided to allow a certain level of divergence from usual HSLS collection policies when planning the merge of the Falk and WPIC periodical collections. For example, Falk print periodicals published before 1990 are kept in off-site storage, while periodicals published since 1991 are kept on site. However, for WPIC periodicals, staff followed the more restrictive retention policies used by the HSLS hospital libraries, which mandate sending to off-site storage all volumes up to the current one if the title is available online. This decision made it possible to drastically shrink the number of volumes that needed to be incorporated into the Falk collection. Also, although the HSLS policies call for collecting materials in English only, staff kept foreign language periodicals if they were not available elsewhere in the United States. The end result of these decisions was that 24 percent of the periodicals were slated for full withdrawal and 17 percent were partially discarded (i.e., the HSLS still holds this periodical, but duplicate volumes were removed).

Once the head of Technical Services completed the evaluation, and the decisions were noted on the periodical lists generated from the ILS, the WPIC Library staff started marking the volumes on shelves to indicate those to be discarded, those to be sent to off-site storage, and those to be moved to Falk Library. Technical Services staff began to update the data in the ILS, and Circulation staff prepared to shift Falk periodicals to accommodate the WPIC volumes about to be integrated. However, this proved to be more complicated than expected. There was little room for error on the available shelving, and no

Table 1. WPIC Materials Withdrawn, Moved to Falk, or Transferred to Off-Site Storage

WPIC Materials by Type	Items in Collection 12/31/08	Items Withdrawn	Items Moved to Falk (or other HSLS libraries)	Items Sent to Off-Site Storage
Videocassettes	2,070	0	2,070	0
DVDs & CDs	45	0	45	0
Audiotapes	2512	1278	1234	0
Reference books	1687	416	1220	51
Consumer collection	682	517	165	0
Circulating books	42,228	8,207	28,074	5,947
Periodicals: Titles*	1,476	361	314	925
Periodicals: Bound volumes	29,000**	number not collected	10,151**	14,022**
Historical materials	Unknown	0	7 boxes	0

* Titles were sent to more than one location
** Estimated numbers

one wanted to shift periodical volumes more than once. The biggest challenge at this stage of the project was stating exactly where and how much space was needed on the periodical shelves, because this would only be known after all of the updates to the ILS were completed. Unfortunately, time constraints forced Circulation staff to start shifting periodicals before project staff had the exact numbers. Thus, although it required an inefficient workflow in Technical Services, in the interests of project efficiency the head of Technical Services did extra work to provide data on segments of the periodicals so that shifting could begin. Several activities occurred simultaneously: Circulation staff began to shift Falk bound periodicals, Technical Services staff changed holdings data for the WPIC periodicals, temporary staff tattle-taped and then moved the WPIC periodicals to Falk Library, the WPIC Library staff packed periodicals to send to storage, and staff at the off-site storage facility received and processed materials sent there. The incredible level of understanding and cooperation between the staff and librarians allowed this to happen with a surprisingly small amount of angst.

As with the monographic collections, withdrawn bound periodicals were left on the WPIC shelves for later decisions about disposition. Because the HSLS wanted to support the NLM's recently created Journal Donation Program (www.cf.nlm.nih .gov/jdonate/index.cfm), project staff allocated time to offer unwanted volumes to the NLM (and other Pitt libraries) in order to fill gaps in their collections. Given the importance of the WPIC periodicals collection, project managers believed the HSLS had an obligation to the library community to dispose of materials in the best possible way, even if it took more time.

In retrospect, one might question the decision to integrate the WPIC periodical collection into the Falk collection rather than keeping it separate (as was done with the monographs) or moving it to off-site storage. The project was certainly difficult and time consuming. However, the staff were available and project managers arranged for the additional time to do so. Since the HSLS periodicals are not classified, there was no added challenge of reclassifying materials. The HSLS librarians believe that patrons will be better served with an integrated collection but recognize the luxury of sufficient staff and time to make this work.

Historical Materials

Project staff were aware that the WPIC Library had been a careful custodian of the institution's history and contained a collection of historical materials that would need special treatment by the HSLS. In addition, as the cataloging librarian was withdrawing monographs, she noticed numerous books published by or about the WPIC in the general collection that had not been recognized as items to be retained. Staff were able to rescue most of these, transferring them to a special collections area. Additionally, during final walkthroughs of the library, project managers found several boxes of historically important newsletters, photographs, departmental minutes, and other items that needed to be moved to Falk Library. The project managers had not realized valuable uncataloged materials might be stored in filing cabinets and closets.

Future Projects

Project staff moved all of the materials to be retained out of the WPIC Library in the allotted time. Table 1 presents final numbers of items withdrawn,

transferred to storage, and moved to Falk Library (and other HSLS libraries). However, many projects remain that will need to be addressed in the coming months and years. They include the following:

- Reclassifying the WPIC reference collection and integrating the books with the Falk reference collection.
- Reclassifying the WPIC circulating collection and integrating the books into the Falk collection. (However, the two collections are now on separate floors of the library, and combining the two will necessitate major space reconfiguration.)
- Weeding the WPIC videocassette collection, reclassifying those retained, and intershelving them with the Falk collection.
- Assessing the audiocassette collection for retention.
- Processing the historical materials.

Lessons Learned

Throughout the project, the project managers made note of processes that seemed to work well and those that did not. They continually analyzed workflows and, at the end of the project, discussed specific parts that did not work well and what might have been done differently. The first area of concern was the entire monograph project. As staff worked simultaneously on the four groups of monographs, the lists began to overlap. For example, some of the earlier editions were also duplicates. This created a problem because conflicting treatments could be dictated for a single item; tracking what treatment may already have been taken for an item when it appeared on multiple lists was difficult. Sorting through these issues required the intervention of a knowledgeable staff member. At that point, there was no time for such interventions. The project managers

realized that because all the lists were run at the beginning of the project (duplicates, foreign language titles, earlier editions, and zero circulation titles), such overlaps were inevitable. The reports were run simultaneously to get estimates about how much off-site storage space would be needed to accommodate these books, but the project managers soon learned that they should have either run reports one at a time (to avoid overlaps in the titles included) or tried to consolidate the four monograph projects into one. Most certainly the duplicates should have been withdrawn as the final phase of the monograph project because so many of the other groups included duplicates. All of this resulted in unintentional withdrawals. In the case of duplicate books within the WPIC Library, the best physical copy was retained; yet, if that copy had not circulated, it would appear on the zero-circulation list, resulting in the withdrawal of both copies. However, when focusing on the monograph collection, one of the drivers in decision-making was the attempt to keep available staff working as quickly as possible to meet the deadline. Therefore staff were not able to rescue these unintentional withdrawals.

In retrospect, leaving withdrawn books on the shelves may not have been a wise choice. Project managers were trying to minimize the amount of time spent handling the books, but as staff worked through the various portions of the monograph collections, books were stamped "withdrawn" and the spine labels crossed out in separate portions of the project; books may have been inadvertently marked as withdrawals. The withdrawn books on the shelves complicated the move of books bound for Falk. Would it have been better to shift withdrawn books to a corner of the library where they would be out of the way and would not complicate successive parts of the project? The authors do not have an answer to this, but they wish they had

thought this through more carefully in the beginning.

Feeling pressured to complete the project quickly, project managers made decisions to save time. For example, staff did not scan the barcodes of books that were packed for transfer to off-site storage, but they then could not locate books when they were needed; staff were not sure if they were in boxes or simply missing. This was especially problematic when dealing with the multiple groups of monograph projects. Letting time be the sole reason for making such decisions may not have been wise.

Because so many historical materials and photographs were discovered at the end of the project, the project managers learned the importance of investigating all materials in the library regardless of where they were stored. A thorough walk-through of the entire library by the task force at the beginning of the project would have allowed more careful planning for the uncataloged materials found at the end of the project.

Recommendations

Although this was a painful, time-consuming, and exhausting task, the project managers consider it successful. The work validates the lessons learned that were reported in Atkins and Kruger's survey, *Managing Large Projects*: "Human beings are your most important resource. . . . Communicate! Communicate! Communicate! . . . There's no substitute for formal and deliberate planning."[14] What did the authors learn that might benefit staff in other libraries faced with a similar situation?

- Detailed planning is essential. Carefully thinking through complicated projects in advance will likely save hours and anguish in the months ahead.
- Collaboration is key. Involve

staff members from across library departments to ensure smooth hand-offs and coordinated workflow.

- Include librarians and staff from the library being closed. Their knowledge about user preferences, locations of materials, and other unquantifiable details can be invaluable.
- Maintain a steady flow of information regarding the progress of the move to all library staff.
- Be willing to change established library policies if needed to facilitate patrons' access to materials.
- The project team should take a careful, detailed tour of the closing facility to familiarize themselves with the collections, identify potential trouble spots, and make sure they locate all materials before a plan is finalized.
- When pulling data from the ILS, think about how people will use the data to do the work. Do they need barcodes or reports sorted by call number, for example? Something as simple as report formatting can affect the efficiency of a workflow.
- Understand the nature of the data in the ILS (such as the specificity of location codes), which can affect workflow decisions. Understand the capabilities of the ILS regarding global data changes.
- Take the time to make the best decisions possible, but do not let time be the sole reason for making a decision (if possible).
- Using the number of available staff to dictate the workflow rather than using a logical progression of activities may not be a wise decision.
- Space is the ultimate determinant for making decisions.
- Projects that could not be completed during the initial phase should be documented to set priorities for special projects in the future.

Conclusion

In the current economic climate and with the ever-increasing reliance on electronic resources, more and more academic institutions may face closure or consolidation of libraries. Librarians are already seeing evidence of this. For example, the Physics Library at Syracuse University closed in May 2008, and the Library and Information Science Library at the University of Illinois at Urbana–Champaign closed in May 2009.[15] The lessons learned by the HSLS librarians may benefit others in similar situations. Planning is essential, even if timing is tight. Assessing the situation with regard to budget, staff, and space and time constraints is vital. Trying to determine in advance the best processes will help lead to a successful result. Librarians know the value of having a disaster response plan for their institution. Now may be the time to develop an understanding of the issues librarians would face if given a mandate to close—to avoid a potential disaster of a different kind.

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Appendix A. Policies for Move of WPIC Collections

- Establish a task force [project team] to include all staff involved with WPIC collection. They will meet weekly to assess progress and move forward in a coordinated manner. Not everyone may need to attend each week.
- Tattle tape: both the WPIC reference and circulating collections will be tattle-taped during the move to Falk.
- No spine labels will be changed except as noted in Work Schedule.
- No reclassification will be done except as noted in Work Schedule.
- Decisions need to be finalized regarding where WPIC monographs and journals will be shelved in Falk.
- We will not identify duplicates between HSLS and other University [of Pittsburgh] libraries. The one exception is zero-hit books. Zero-hit books that are also held by other libraries will be withdrawn (not moved to off-site storage).
- Our collection policy states that we collect only English language materials. We will analyze foreign language monographs in the WPIC collection (i.e., circulation, historic value). We will withdraw foreign language monographs that have not been extensively used nor are of high value.
- WPIC discards. We will retain withdrawn materials in the library. After all other materials have been moved, we will contact book sellers, other libraries, etc. to take those that they want. We prefer to sell materials, if possible.
- Historical materials. We should retain some duplicates. There may be other history of medicine libraries who might take some before we offer them for sale or to other libraries in general.
- WPIC photographs. We will remove from frames and add to our special collections materials in Falk.
- New psychiatric monographs that are purchased will be added to the Falk collection. No new materials will be added to the WPIC monograph collection.
- Weekly updates will be sent to all HSLS staff regarding details and progress of the move.

Journals

- Unique WPIC journals
  - We will withdraw
    - nonpsychiatric journals
    - foreign language journals (after evaluating for use and historical value)
    - journals with scattered holdings
    - single issues
    - newsletters
  - Those journals we withdraw will be offered to other University [of Pittsburgh] libraries, then to NLM. If neither wants them, we will offer to other area libraries. We will not take the time to assess if libraries already have the materials. They would have to pack and pickup and pay for postage (NLM).
  - The head of Technical Services has the leeway to send journals with publication dates in the 1990s to off-site storage if doing so would alleviate time-consuming holdings work by Technical Services staff (even if this "violates" our stated policies regarding location of journals).
- Duplicate WPIC journals
  - Retain those issues and volumes that will fill gaps in current holdings
  - Withdraw true duplicates. We want to offer to other University [of Pittsburgh] libraries, NLM, etc. as above.
- Unique print WPIC journals for which we have online access. We will transfer to off-site for archival purposes.
- We will integrate current WPIC print subscriptions into Falk.
- We will accept donations of print journals per our gift policy for journals.
- We will physically integrate the bound WPIC journals with journals in Falk.

Reviewed and accepted by HSLS Executive Committee, January 8, 2009.

Appendix B. Planning Timeline 2009

Note: Dates in parentheses reflect the time of completion for each phase.

2008	January	February	March	April	May
	Videoscassettes (early Jan)				
	DVDs & CDs (early Jan)				
Duplicate titles withdrawn (late Jan)					
		Reference collection (Feb)			
		Consumer collection (Feb)			
		Previous editions transferred off-site (Feb)			
		Foreign language books withdrawn or transferred off-site (Feb)			
			Zero-circulation books withdrawn or transferred off-site (Mar)		
			Circulating books transferred off-site (Mar)		
				Circulating books moved to Falk (April)	
					Journals transferred off-site (May)
					Journals moved to Falk (May)
				WPIC audiocassettes evaluated; moved to Falk (May)	
					Historical materials moved to Falk (May)
					Book tattle-taping (May)
					Withdrawals—disposition ?? (May)