University of Waterloo Library Space Revitalization: Enabling Student Success & New Spaces for New Times

Phase I: Dana Porter 3rd & 5th Floors and Davis Centre Critical Issues

Prepared by Annie Bélanger and Sharon Lamont

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# Executive Summary

The University of Waterloo Library is embarking on a significant space revitalization initiative. The overall plan is to have a series of renovations over the coming years as funds become available through fundraising and other funding opportunities.

The first phase of this revitalization initiative is in the planning stage at this time. The following Charter articulates the planning process and governance structure of upcoming renovations to the 3rd and 5th floors of Dana Porter Library and to deal with the most pressing issues in Davis Library, as funds allow. Phase 1 planning will include all aspects of this renovation; however, implementation is anticipated to be divided into 3 stages. The projected budget for Phase 1 is $2 million, a combination of operating budget carryforward and funds already raised.

Library Executive Committee will serve as the Steering Committee under the leadership of the University Librarian. An advisory committee will be established for Phase 1 under the leadership of Sharon Lamont, Director of Organizational Services. Annie Bélanger, Associate University Librarian, Information Resources & Academic Excellence will serve as Project Lead and Owner. Team Leads will head the three sub-project teams and will work with the Core Project Team. A professional Project Manager will be hired to work with the Core Project Team and the sub-project teams.

Planning began in Fall 2015 with the first stage of the renovations to take begin in spring of 2016.

# Project Overview

## Project Context

The Library is a popular destination for research and study – more than 17,000 people enter our doors each day. In sync with other campus collaborative efforts to improve student spaces, improved library spaces will enable and further both the campus strategic plan and the Library’s Strategic Directions[[1]](#footnote-1). As part of the Campus Fundraising Priority Concept Proposal process, the Library submitted a proposal to revitalize all Library spaces, which is estimated at a value greater than $6.6 million.

Library and campus study space are well below average in the Council of Ontario Universities’ (COU) Inventory of Physical Facilities. COU’s inventory compares the actual space each Ontario University has to the required space based on the student population. The Library therefore is seeking to maximize library user spaces within its existing footprint while it is also committed to improving and optimizing library spaces with a focus on four areas: user space, particularly for students; service points; staff space; and collection space.

## Problem/Opportunity Description

Six of the ten floors in the Dana Porter Library and both floors of the Davis Centre Library are in need of further modernization and repurposing. Modernizing library spaces will facilitate and enable Waterloo’s strategic goals of developing leaders of tomorrow, providing a vibrant student experience, accomplishing world-changing research, and also fits well with an emerging campus focus on Lean Management. This goal also aligns well with the Library’s Strategic Directions of Enabling Student Success, New Spaces for New Times, and Advancing Research and Scholarship.

The overarching project opportunities include:

* Modernized and ergonomic spaces in which students and staff can study, learn, work and socialize
* Intentional alignment with other campus services during and beyond the University’s traditional business hours, will:
	+ Foster knowledge sharing, skills sharing and collaboration amongst students
	+ Support student learning and the development of skills required for overall academic success
	+ Enable the integration of student services in support of learning and academic skills
* Leveraging proactive collection stewardship to enhance preservation and the access to the collection by optimizing, as well as finding new, collection storage space and pursuing alternate formats:
	+ Enable Waterloo’s graduate students, faculty members and researchers access to information required for their research
	+ Provide for the development of spaces enabling collaboration between faculty members and students, inspiring and encouraging creativity and innovation
	+ Support the continual systematic assessment of the Library’s collections and services in support of research in both existing and emerging areas
* Optimized space for the campus community as well as library staff will create opportunities to extend Library and University collaborations with regional, national and international consortia and associations.

## Project Goals & Objectives

Building on more than a decade of successful renovations, the Library Revitalization project will increase the availability of bright, ergonomic spaces with high-end multimedia workstations, updated study carrels with appropriate power sources for lighting and outlets, group work and social spaces. Such spaces will be designed to inspire intellectual discovery, promote wellness, and provide a better learning environment.

The project will specifically respond to campus needs for appropriate research, study and learning/working spaces that are user-focused, integrated and accessible. The project will also identify and plan for opportunities to repurpose existing space in order to make the most efficient use of library floor space, with a focus to maximizing user space where possible.

## Stakeholders

Stakeholders, while not having a direct decision-making ability in the project, are those who will or may be directly or indirectly impacted by the project. In other words, they are the target audience of the project consultations and related outcomes.

* Student and faculty users of library services and space[[2]](#footnote-2)
	+ They are primary users of the library, both physically and virtually. They are directly influenced by the results of this project, but are not directly involved with the planning and construction process of this project.
	+ They are represented by student and faculty representatives.
* Library staff who are not directly involved with the project team
	+ The working environment of library staff is influenced by this project and its outcomes, both during and following construction.
	+ They are represented by the library staff directly involved in the project team.

# Project Scope: Phase I

As described in the Project Overview, the Library is in need of modernization and re-purposing in many areas. Phase I of this Revitalization Project, however, focuses on renovating the 3rd and 5th floors of the Dana Porter Library (DP) as well as critical priority areas in the Davis Centre Library (DC).

# Project Plan

## Deliverables

A “vision” and change management plan for the renovation and repurposing of the DP 3rd and 5th floors and the DC critical priority areas will be developed. It will include:

* Analysis of space use, needs, and adjacencies for DP 3rd and 5th floors and DC, including:
	+ Identifying opportunities that extend beyond the targeted spaces for staff consolidation and to streamline collections
	+ Identifying the most significant challenges for DC library users and staff in order to address these challenges to the extent possible within the identified project budget
* Identification of campus collaborative service delivery opportunities
* A consultation and communication plan
* Scope of work and designs for the identified renovations
* Cost estimates for the renovation plans
* A staging plan for the identified renovations

## Approach and Methodology

The project methodology will be defined by engaged, iterative planning, which leverages project management and stakeholder management best practices. Supporting a “new skills for new times” approach, the renovations will enable the development of the next generation of library space planners by leveraging opportunities for growth and leadership within the project.

Consultation to define the vision will occur as well as consultation at each critical stage of the project and related sub-projects. Initially, the discussions and consultations will relate to both DC and DP. The benefit of having simultaneous discussions is that additional opportunities may present for solving issues campus-wide, rather than on a site-by-site basis.

The following strategies and activities will be used to assure successful delivery of project deliverables:

* Use the project sponsor as point of accountability for key decisions, including approval of deliverables
* Engage with the Advisory Committee to inform strategies and key decisions
* The resulting renovations will be staged rather than concurrent due to the financing and workload of managing significant renovations. Self-contained sub-projects will be defined as part of the staging approach.
* Project planners will work with professional consultants where appropriate and possible.
* Engage a subset of key target audience groups to provide feedback on designs
	+ This group would provide feedback only
* Maintain a primary focus on user-centered, universal design and Library Strategic Directions

## High-Level Timeline

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| --- | --- |
| Fall 2015 – Project Start-Up | Consultation to finalize charterEstablish Library Revitalization Advisory Committee, within scope of this charter  |
| Winter 2016 | Preliminary consultations with users and staff about projectBegin space use, needs, and adjacencies study Begin to define opportunities for sub-projectBegin developing “vision” for sub-project |
| Spring 2016 | Preliminary consultations with users and staff about projectContinue space use, needs, and adjacencies study Define opportunities for sub-projectDefine “vision” for projectsProject planning with campus resources  |
| Fall 2016 | First defined sub-project moves to external consultant stageFinalize space use, needs, and adjacencies study Define opportunities for sub-projectsScope sub-projects and focusesEstablish sub-project teamsConduct further user space studies |
| Winter/Spring 2017 | Design consultationsDefine and begin implementation of first sub-project |

## Project Budget

The Library commitment to the project is $1.5 million of operating funds and $.5 million of development funds, for a total of $2 million. It is understood that the majority of the operating funds will be directed to the staff space renovations.

If costs of the project exceed the Library’s ability to pay, other funding options include fundraising, campus funding, or financing.

## Success Criteria

* High level of library user and staff satisfaction with the new spaces and with their participation in the process
* Project comes within budget and on time
* Changes to scope and timelines are communicated

## Project Organization and Staffing

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Individuals** | **Accountabilities**  | **Time Commitment**  |
| Steering Committee | Library Executive | All guiding principles are approved through this committee, and all major decisions have to have the commitment of this group. LibExec gives strategic direction and resourcing to the project.* Approves
	+ Changes to scope and deliverables
	+ Deliverables
	+ Budget proposal
 | Low |
| Advisory Committee | * Core Project Team
* Library Staff Reps (1 from DC and 1 DP Location)
* Reps from:
	+ GSA
	+ Feds
	+ Plant Operations, Design Team
	+ Student Success Office
* Teaching Fellow
* Manager, Space Planning
 | * Chaired by the Project Sponsor
* Provide:
	+ Guidance and support
	+ Feedback on project ideas, development and recommendations
	+ Informed opinions on issues and concerns as stakeholders
* Bring insights from their constituents’ perspectives
* Act as project champions across the campus
 | Low (likely a monthly meeting) |
| Sponsor | Sharon Lamont, Director, Organizational Services | * Leads:
	+ Budget & Resourcing
	+ Advisory Committee
	+ Campus partnerships related to design and build
* Oversees
	+ Project communication
	+ Timeline and budget
 | Low to Medium, phase dependent |
| Project Lead | Annie Bélanger, Associate University Librarian, Information Resources & Academic Excellence | * Leads:
	+ Core team
	+ Development of overarching project plan, communication plan, and associated plans
	+ Budget development and tracking
	+ Timeline development and tracking
	+ Campus collaborative service opportunity exploration
	+ Collection streamlining opportunity exploration
	+ Campus communications
	+ Core project team
* Oversees
	+ Sub-projects: timeline, cost tracking, Library communications
	+ Consultations and focus groups protocols and delivery
	+ Staffing and coaching
* Works in close consultation with Project Sponsor
 | Medium to High |
| Team Leads | Sarah BrownRebecca HutchinsonAdam Savage | * Participate actively in:
	+ Core project team, developing plan(s) in areas of accountability
	+ Advisory Committee
	+ Project tracking and communication
	+ Consultation with end-users and staff
* Lead:
	+ Sub-project team
	+ Development of sub-project’ project plan, communication plan, and associated plans
	+ Sub-project budget development and tracking
	+ Sub-project timeline and tracking
* Oversee
	+ Consultations and focus groups protocols and delivery
	+ Staffing and coaching
* Works in close consultation with Project Lead
 | Medium to High (when assignedsub-project underway) |
| Sub-project Team(s)  | TBD as each sub-project begins | * Actively participate in the development, planning, implementation of the sub-project
* Leads, if applicable, specific area of accountability
* Works in close collaboration with Team Lead(s)

\*Further defined in sub-team scope notes | Low to Medium, phase dependent |
| Project Manager | TBD, Project Manager | * Member of the Core Project Team
* Participates in sub-teams
* Facilitates and supports the work of the Project and Team Leads in area of project management
* Liaises with Architect
* Leads/Co-leads:
	+ Development of overarching project plan, communication plan, and associated plans
	+ Budget development and tracking
	+ Timeline development and tracking
	+ Sub-projects: timeline, cost tracking, Library communications
	+ Library responsibilities for RFP documentation development
* Ensures:
	+ Consultations and focus groups protocols and delivery
 | Medium to High, phase dependent |
| AODA Consultant | TBD, Coordinator, Library Services for Persons with Disabilities & AODA Consultant | * Member of the Core Project Team
* Provides:
	+ Feedback on project ideas, development and recommendations with an accessibility/universal design lens
	+ Awareness of best practices related to accessibility including environmental (universal design & procurement), customer service and educational (universal design for learning) advances
	+ Awareness of advances in accessibility services, technologies and resources as related to the project
* Leads consultations with AccessAbility Services and its registered users
 | Low to Medium, phase dependent |
| Knowledge Transfer Consultant | Alex McCulloch, Head, Circulation | * Member of the Core Project Team
* Provides:
	+ Feedback on project ideas, development and recommendations with a knowledge transfer and coaching lenses
	+ Awareness of project management, stakeholder management, change management, and library practices
* Supports the Project Lead in the implementation of the overall project and the Team Leads with the sub-projects
 | Low to Medium, phase dependent |
| LTFS Consultant | Carl Nagel, Head, LTFS and/or Designate  | * Member of the Core Project Team
* Provides:
	+ Feedback on project ideas, development and recommendations with a facilities operations and management lens
	+ Liaises with Plant Operations as required
* Leads staff relocation planning during implementation phase
 |  |

## Project Decision-Making

* Campus Administration
	+ The project will be conducted in accordance with campus best practices and in consultation with appropriate parties, including Plant Operations, Finance, and Procurement.
* Library Executive Committee (LibExec)
	+ This committee has direct influence on the renovation project and will serve as the Steering Committee. All guiding principles are approved through this committee, and all major decisions have to have the commitment of this group. LibExec gives strategic direction and resourcing to the project. LibExec is responsible for decisions relating to changes to project scope, budget increases, and other critical project matters.
* Library Executive Sponsor:
	+ As a member of the Library Executive committee, the sponsor has primary responsibility for keeping LibExec and campus primary stakeholders informed.
* Project Lead:
	+ As the person accountable for the project and the core team, the project lead has primary responsibility for project and sub-project decisions and budget management, stakeholder management, and escalating issues to the sponsor.

# Issues, Risks, and Assumptions

## Assumptions

* The project is focused on the users’ needs, anchored on user experience assessment and communications, aiming to maximize the amount of user space
	+ Same or more/better study space
	+ Workflows and adjacencies will be a significant driver guiding the final designs
	+ Spaces developed with promote wellness and health as well as be flexible
* Consultation with users and staff will be an integral part of the process
* Where possible, provide workload relief or stipends for staff with significant involvement in leading the renovations
* Budget, scope and timelines are adjusted as required and communicated
* Operating funds that have been earmarked for this project will continue to be available to the Library into future fiscal years
* Collection stewardship will be a focus, seeking opportunities to purchase electronic alternatives and rationalize further across TUG
* Additional space for retained low-use collections will be sought, and found, to preserve on-campus space for users and services

## Critical Partnerships

* Plant Operations, design section
* The University Architect, perhaps external consultants
* Campus space planners
* Finance
* Advancement
* Library staff
* Library users

**Project Risk Assessment**

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Probability** | **Impact** | **Contingencies** |
| Adequate resourcing of project team as consultations will likely be time consuming at the same time that the Library is moving forward with other large initiatives  | Low | Low | Continuously review of project momentum and identify any impacts caused by unavailability. Increase staff commitment to full time status if necessary |
| The costs to modernize and repurpose may exceed the Library’s ability to cover them | Medium | High | Collaborate closely with campus to seek financial assistance for the project. |
| Timeline unrealistic | Medium | High | Timeline reviewed monthly by project manager and steering committee to prevent undetected timeline departure. |
| Cost estimates unrealistic | Low | Low | Budget planning to be included in project plan, reviewed regularly to make suitable adjustment as new details regarding project scope are revealed. |
| Project scope creep | Low | Low | Scope clearly defined in project plan, reviewed monthly by project manager and steering committee to identify potential scope creep. |
| Library staff have been anticipating these renovations for a couple of years which increases the wish to move forward expeditiously | High | Low | Make comprehensive communication plan and ensure frequent communications. |

# Appendix 1 – Campus Strategic Plan, Excellence Canada & Library Strategic Directions

The University’s Strategic Plan speaks to enhancing campus services and spaces to ensure that students have an engaging, purposeful and relevant experience (Vibrant student experience). As a major service provider and a popular student space, the Library has an exciting opportunity to advance this goal and the following objectives and supporting actions:

*Primary objectives most relevant to Library planning:*

* Deliver excellent student services through an integrated student-focused approach
* Develop strong partnerships within and between academic and non-academic units to enhance the positive student experience
* Build a community of communities by providing an environment where students, faculty and staff can connect

*Supporting actions most relevant to Library planning:*

* Enabling an IT environment that facilitates student interaction and improves student life
* Providing the means for students to interact across different programs
* Integrating and optimizing processes, communications and systems to support student success
* Enhancing research, study and social space
* Improving support services for students who live off-campus
* Enhancing the physical appearance of the campus to be more attractive and people-centric

As a resource to all students across Faculties, the Library is in a unique position to advance this strategic theme in a significant way; however, such an approach requires adequate funding. In our recent benchmark survey for Excellence Canada’s Excellence, Innovation & Wellness, Bronze Assessment, a student library worker saw this opportunity when noting that the University could do better by providing “more funding to the library to actualize changes that will make the students’ studying easier (renovations and extension to the libraries, more open-concept study spaces, better study carrels, ergonomic chairs).”

Attractive and functional work space is also key to fulfilling the University’s goal to be an exemplary employer (Robust employer-employee relationship) as we seek to:

* Attract and retain the highest-quality candidates for faculty and staff positions
* Enhance the reputation of the University

Several permanent employees noted space issues as things the Library could change in the Excellence Canada survey in comments such as the following:

* “The aging infrastructure is in need of refreshing for both staff and students. Work and study environments have not kept pace with ergonomic and technology requirements.”
* “I wish that the Library could renovate staff and public areas to better meets the needs of staff members and students.”
1. For more details on alignment with the strategic plan and strategic directions, see appendix 1. [↑](#footnote-ref-1)
2. Though general community users are not listed as stakeholders, the open nature of the consultation process will allow for their input and feedback to be collected. [↑](#footnote-ref-2)