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Library Annual Report, 1994-1995

Bates College

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The George and Helen Ladd Library
Bates College
Annual Report, 1994-95

Nine months into my work at Bates College, it is already time for an annual report. This has been a time of great accomplishment and great promise for the Library, as well as a time of some upheaval, anxiety and frustration. The Library staff and I are in the process of getting to know the expectations and habits of one another, and at the same time making the critical assessments necessary to assure that all our activities are oriented to providing library services that will help keep Bates College an outstanding place to study and to work.

The staff of the Library knows how to run a good library. By all measures of service, this was an outstanding year. Use of the building increased by more than 10 percent over 1994. Circulation of books increased by 5.8 percent, and government documents by 9.6 percent. The explosion in use of media continued, with sound recording circulation up 33.8 percent and video circulation up 17.1 percent. The Library also continues to be dependent upon resources of others to serve the student body. Interlibrary loan transactions increased by 19.8 percent this year, continuing a trend that continues to move ILL closer to the core of the services we provide. Interlibrary borrowing has increased an average of 20.4 percent per year for the past five years. In a business where reciprocity is the general rule, lending has also increased an average of 18 percent per year over the same period. Interlibrary borrowing now accounts for almost 6 percent of circulation to Bates users. Reserve use of printed material owned by the Library continues to be important, but is not growing. All of the increase this year in print reserve use (up 9 percent) is associated with materials not owned by the Library (primarily photocopies). Reserve use of audio and video materials (virtually all of which is owned by the Library) is also up about 10 percent.

In anticipation of a new Librarian, the Library and the College had developed an ambitious set of expectations and goals. Most of these, thankfully, were documented in excellent reports from Library departments, the faculty committee that reviewed the Library, and the Visiting Committee. Knowing that the Library was running at its usual frantic pace, my personal goals were to get to know the campus as quickly as possible and to get started on this ambitious agenda. In the first goal I had some success, particularly with the help of Paula Matthews, who keeps introducing me to people, procedures and problems that I need to know about. In the second, we managed to get started on a number of fronts. We started more than we finished, however, and at times the pace of change has been confusing to some and frustrating to others. One department head refers to a pervasive "wait and see" atmosphere. This suggests that I need to spend more time communicating about and managing the pace of change, and keeping the messages simpler so as not to confuse the staff, the users, myself and others.

We made some real progress in developing new budgetary and personnel practices for the Library. We made concerted effort to improve the visibility of the Library on the campus and in the community. We began to take control of the collections of the Library by completing the first full review of the serials collection in a number of years (the First Annual Serials Review), and by devising a new scheme for relating to the faculty and users with respect to the collections. The College has been responsive to our analysis of budgetary needs for the coming

year, but the anticipated price increases for journals will require us to be even more thoroughgoing in next year's review.

The Personnel Committee undertook a review of the Library Personnel Policies and Procedures Handbook. By the end of the fiscal year, we will have completed the sections defining membership in the staff, elections, the role of the Personnel Committee, and the section on performance reviews. The most important change in personnel practices this year, however, was the adoption of the College's vacation policy for administrative staff. This changed a twenty-five year policy the College had maintained for Library staff and reduced the amount of vacation time by one-third. This change was implemented smoothly, but has had lingering effects on morale. In the course of implementing the new policy, we completed a general review of practices for reporting work days, sick and vacation time for the Library's exempt staff.

We reviewed policies and procedures for external borrowers. The results of this review are a revised application process, clearer guidelines for extending borrowing privileges to local adults, and more timely and effective response to requests. We are still not making all constituencies happy. The results of this review have been helpful as the College looks at facilities access more generally. We also initiated a review of services we provide for summer programs.

Several new staff members were hired. Susan MacArthur joins the staff in Acquisitions and Cataloging, and Steven Abbott is filling in two temporary half time vacancies in Circulation and Acquisitions. David Carpenter has saved the Library administrative office from sheer chaos in his one-year appointment to replace Rachel St. Pierre. Rachel has now returned to work and is pushing as hard as she can to return to full-time work. Gilbert Marcotte's reporting line was moved from Serials to Circulation in recognition of his *de facto* connection to the Circulation staff. Sarah Wagner left the Circulation department for a new life in Boston. Brenda Reynolds filled in on a part-time basis in Winter Semester to cover Sarah's work. Gerard Beaudette will retire at the end of the year, and has given us a real opportunity to assess how far the Library has come in the past quarter-century. His annual report from Acquisitions expresses how he feels.

Annual Goals

At the beginning of the year, Acting Librarian Paula Matthews outlined goals for the year. The progress the Library has made toward these goals is outlined as follows:

1. Long-range planning for space. Plan for collections, user and staff space needs.

The President and the Dean requested a report by mid-year outlining the Library's needs for the Capital Campaign. Following a review of this report by the Library Committee, the Library staff, and other members of the administration, we began a feasibility study with David Sheffield and Michael Cohen, formerly of The Architects Collaborative and now in independent practice. This report will be complete early in the coming fiscal year which will outline the long-range plan for the building, with plans to improve facilities for electronic

collections, media and multi-media, and user seating. It will also involve redesign of staff space.

We also dealt with short-term building issues. We continued to investigate air handling capacity of the Library. With some controversy and extended discussion, and ultimately with support of the President, we eliminated smoking in the building. This will allow the White Lounge to be used for general group study. We also responded to the discovery of unacceptable levels of lead in the water fountains with bottled water, and worked with Physical Plant to develop a mechanism to flush the system regularly, and, once the fountains were returned to service, to monitor water quality in the future.

We struggled throughout the year with flaky and unpredictable photocopy services in the Library. Debit cards were inexplicably losing their value. Due to careful and relentless detective work by David Carpenter, we identified that defective equipment was the culprit. Though repairs have been made, the effectiveness of the repairs will be uncertain for some time, until a new card system is implemented.

2. Long-range planning for technology and information services:

The Librarian joined the other four members of the Information Services Management Team to create a team of five. Much effort has been expended to make this a productive working team, and some significant progress has been achieved. This has long-term benefits for the Library, as we can plan for computing laboratories, electronic classrooms, bibliographic instruction and teaching spaces, and networking connections and resources in an environment that includes both information content and information delivery under a common organizational umbrella.

a. Full text resources and their potential effect.

Some tentative steps are in the works. We will eliminate some print subscriptions in the coming year, based on availability of Lexis/Nexis. There is considerably more work to be done to identify these sources and bring them into the collections.

b. Electronic reserves for students.

A modest pilot project is in place.

c. Collection development policies for electronic resources, including establishment of policy for cancellation of print.

Serials review conducted in the Winter Semester identified a series of print sources that can be dropped in favor of electronic equivalents. There was discussion with members of the faculty on many of them, and a gratifying understanding of the trade-offs involved in making the switch.

3. Develop new collection development and collections management plan. Review YBP plan, develop weeding program, develop serials collection development and management plan.

Beginning in late Fall, staff involved in collection development for the Library began meeting with the Librarian to address this issue. Draft recommendations on establishment of a liaison program, a new budgetary structure to support collection development work, and performance expectations for collection development staff were reviewed. These documents engendered an interesting and healthy discussion of the role of librarians and library assistants in collection development work. The new practices will be completed and implemented in the coming fiscal year.

Once the staffing is in place, policies and practices will need to be elaborated. This will be a major effort for the coming year.

We reviewed binding practices and performance of the binder, resulting in change of the binding contract to Ridley. This has resulted in more rapid turn-around and significant cost savings.

4. Outreach to faculty and departments. Professional staff must be visible on campus. Expand opportunities, and expect new Librarian to lead in these efforts.

We look for every opportunity for significant Library involvement. The Librarian served on the Educational Policy Committee, the Hughes (I) Council, the President's Council, the Search Committee for Vice-President for Development and Alumni Affairs, and the presidential subcommittee on the Bates Community. The Associate Librarian serves on the Curriculum and Calendar Committee, President's Council, and the Search Committee for Affirmative Action Officer.

We initiated discussions with department chairs regarding serials collections, with a gratifying response. The Library Committee provided a continuous source of advice, especially on smoking, space planning, and collection development efforts. A fully-developed liaison program for collection development will strengthen the contacts between library staff and the academic departments.

The Library hosted three public events, including a reception for new faculty in the fall, a continuous reading of the new Anne Frank diary, and a poetry reading by Rob Farnsworth and Fred D'Aguiar

5. Clarify new budgeting processes, and fully implement Banner system. Address budget issues in the context of long-range planning. Work with development office, include strategic goals into the Capital Campaign, and look for more creative funding options.

The Library worked intensively to develop and refine budget categories for the new chart of accounts. We eliminated the separate accounting process in the Library business office. A working group is developing procedures to take better use of the Innovative Interface invoice processing function, which should reduce labor and error in invoice processing for library materials. We desperately want to see Banner on-line, but found manual ways to identify and correct several large accounting errors.

We will propose to create a separate fiscal organization for the photocopy operation for the coming year. This should help us understand if the service is making or losing money, and how it can be improved.

We eliminated the practice of setting the Library's budget for the coming year based on specific equipment or supply needs, looking at this year's priorities and kinds of activity instead. This year's priorities centered on ergonomic aspects of new computers, and we will fund most of the chairs and supports that are needed.

The Budget Committee was involved in reviewing the budget status of the Library at three critical stages: in reviewing past practice and setting new practice for equipment, in reviewing budget priorities for the coming year, and in establishing priorities and contingency plans for closing out the current year's budget. My goal was to involve the staff in viewing the budget as a whole, and to see it as a working document that serves Library goals rather than a fixed set of decisions.

In addition to doing the planning for the Capital Campaign outlined above, we made some progress in getting involvement in development work, but much remains to be done. Major gifts of collections were received from Alice Esty and D. Scott Birney. Paula Matthews and David Carpenter designed a display of materials of Frank Glazer, some of which are part of his gift to the Library. I visited an alumnus in Pittsburgh to see if we could reach an understanding regarding the disposition of his collection of African-Americana, which remains to be resolved. This will be an area of increasing activity, both in stewardship and in working with the Development Office to identify prospects and ideas.

6. Special collections. Examine space, expand hours, perhaps including cross training of staff. Cooperate and coordinate with other groups on campus concerned with College records.

Space planning has been incorporated into Library-wide planning. No progress was made in expanding hours. Paula Matthews, Mary Riley, and I reviewed a draft proposal from Dean Carignan to establish a College Archives. More will happen in this area in coming years.

7. Install Ariel.

Installed, functioning, and delivering high quality images without Fax charges. Very difficult to install, requiring much fiddling.

8. Strengthen consortial activities with Bowdoin and Colby. Articulate role of working groups and make projects mesh with Bates long-range planning goals and priorities.

We made some preliminary steps to develop articulate long-range goals, but this will need to become a major item for next year. Working groups continued work. Government Documents group prepared plan to share titles, including the Serial Set. A task force looked into finding a better alternative to Expanded Academic Index, and will have final recommendations before the end of the fiscal year. This investigation should result in a plan that will also make our collections on CD-ROM more accessible on the campus network.

9. Establish better-defined and organized staff development plan for the Library.

In terms of activity, staff development and training, and associated staff travel, continue to be a high priority for the Library. We proposed and achieved better budget support for the coming year. A Staff Development Working Group has developed improved procedures for making information about staff development opportunities available, and has developed draft orientation guide for new Library staff.

10. Investigate team approach to technical services activities, to better utilize present staff and space, better define processes and maximize efficiencies.

Joint workshops with Information Services staff provided some focus to the discussion of teams. The staff in Technical Services began to meet as a group in Friday Coffee Breaks, with the effect of improving communication among staff and departments, and providing a setting for focused discussion of this and other issues. This discussion is just beginning to take shape, and will help clarify organizational and staffing issues in the coming year.

11. Clarify reporting structures within the Library, based on the vision of reorganization that the New Librarian will bring, or simply a strongly-worded re-articulation of accountability within and across departments.

The New Librarian has held off formal reorganization of the Library, based on his own vision that reporting structures should follow activities and priorities, rather than be imposed from outside. There is some uncertainty about reporting structures within the Library, and a tradition of departmental and individual autonomy which needs to be strengthened and infused with a Library-wide sense of priorities and goals.

12. Review internal personnel document, bringing internal policies regarding evaluation into line with other campus directions or with solidly-based personnel management techniques as cited in the professional literature.

The Personnel Committee began a full review of the personnel handbook for the Library, outlined above. Their efforts have simplified and clarified the document, and brought it into line with current practice in the Library. This process included review of the evaluation process in the Library and the proposed process for the Campus. Renee Phelan has worked with the President's Advisory Committee and the Director of Personnel to understand campus directions. We should have a plan to implement in the coming year. This plan will include regular review of the personnel document so that it does not get out of step with current practice.

In her report last year, Paula Matthews referred to elimination of a "caste system" in personnel practices by changing all staff to exempt status. We have some work to do to help understand the differences between librarians' and library assistants' roles within the Library to avoid creating the perception of yet another "caste system."

13. Make concerted efforts in the areas of preservation and conservation of present collections. This would be an excellent area within which to have cross-departmental groups work.

We have initiated conservation work on a number of items in Special Collections, and reviewed some binding practices. Plans for Special Collections space should take better advantage of the specialized air-handling capacity of the facility. A systematic look at preservation awaits another year.

Goals for 1995/96

1. Provide services and information resources of the highest quality that meet user needs.

- Enhance bibliographic instruction program, improve visibility of program, and expand opportunities for instruction. Develop instructional objectives for students.
- Provide public internet work stations for access to remote files, including government information.
- Expand electronic reserves.
- Special collections. Examine space, expand hours, perhaps including cross training of staff. Cooperate and coordinate with other groups on campus concerned with College records.
- Revise fines policy.
- Revise reserve and copyright policy.
- Refine programs to assess user needs and review library operations in terms of their impact on user services.
- Review existing signs and develop outline for new signage program.

2. Provide collections in print, non-print, and electronic formats that meet present and future needs of the College.

- Implement new selection structure and budget for library materials.
- Develop revised collection development policy that links collections to the curriculum.
- Develop policy for electronic resources that integrates selection and budgeting with other library materials.
- Explore coordinated collection development and collection storage with CBB.
- Develop and implement weeding policy.
- Review serials and standing orders for possible cancellations.
- Implement serials use study.
- Assess approval plan.

3. Provide records and systems that enhance users' ability to access materials.

- Work with CBB to develop ways to make catalogs look alike and to match patron and bibliographic records in order to provide enhanced access across the consortium.
- Implement Innovative Interfaces inventory control module and re-engineer associated processes.
- Complete evaluation of serials display and implement needed changes.

- Study process to load records for U.S. Government documents into the catalog, including budget and workflow issues and make recommendations for implementation. Automate documents shelflist.
- Work with CWIS to evaluate relationship of WWW Library Home Page with other collections and services of the Library.
- Improve claiming of materials.
- Examine priorities and staffing for cataloging, based on needs of the curriculum and changes in technology.
- Load records of Muskie Archives.

4. Provide a physical environment that enhances the use of information and promotes independent study.

- Complete master plan for building, with projects, costs and priorities.
- Plan for collection and office moves, and look for opportunities to improve user seating in light of master plan.
- Work with Physical Plant to provide regular updates on air quality, water quality, and improvements and maintenance for the building.

5. Attract staff of highest quality and train them and equip them to provide best possible services.

- Provide for continuous training of staff, including staff development opportunities in the Library and at other locations.
- Learn to use new work stations and software as dumb terminals are replaced.
- Improve teaching skills of library staff.
- Continue to improve workspace design and ergonomics of staff work stations.
- Examine level of compensation for library staff and make needed recommendations for change.
- Examine need for and assignment of student workers; enhance their image, and assess evaluation process.
- Continue review of personnel policies and procedures, pay attention to changes on campus-wide basis, and implement revised performance review process.

6. Manage human and financial resources of the Library to provide for optimal use of resources in support of services to users.

- Review mission, goals and objectives of Library to bring up to date with current priorities.
- Implement changes in invoice processing using Innovative processes.
- Look at structure of Technical Services.
- Develop new budget structure for photocopy operation.
- Examine structure, reporting, and use of statistics on Library-wide basis.
- Look at staffing needs in ILL.
- Develop more reciprocal agreements in ILL, and look at alternative billing methods.

7. Develop relationships with constituencies outside Bates that enhance the Library and its services to users.

- Review policies for local borrowers in light of new definition of Bates Community.
- Strengthen ties with CBB libraries through development of long range mission and goals for the consortium.
- Complete review of services for summer programs and special students.
- Examine and improve stewardship with donors for gifts and endowments. Design new bookplate.

A statistical summary is appended to this report.

Respectfully submitted,

Eugene L. Wiemers
College Librarian
May 30, 1995