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Library Annual Report, 1997-1998

Bates College

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**The George and Helen Ladd Library
Bates College
Annual Report - 1997/98**

Two themes express the Library's activity this year--planning for the future and providing outstanding service to users. In planning for future services, the Library staff has had an extraordinarily productive year in four principal areas: 1. Positioning the Library to use the Web to offer library collections and services; 2. Working to make CBB cooperative services an integral part of our services to Bates; 3. Exploring alternative ways to get work done, particularly in processing of materials; and 4. Completing renovation plans for the building. Progress on these activities, and the other high priority areas for planning and change, is outlined below in the summary of progress on goals.

Planning is always done in the context of providing outstanding service to Library users. One of the key strengths of the Library staff is the ability to maintain a proper balance between attention to change and attention to the work at hand. All the effort to align circulation policies and procedures with those of Colby and Bowdoin has been done while existing services continue to expand. While other college libraries report declining circulation, all indicators of use at Bates continue to increase. In 1997/98, users borrowed more than 191,000 items. Of these, 53 percent were books from the circulating collection; 31 percent were reserve items (print and audio/video materials); and 4 percent were items borrowed on interlibrary loan. The use of audio and video materials continues to put heavy demands on the ground floor service point, with 17 percent of all borrowing transactions occurring in Audio. At the same time, instructional services continue to grow (see below). The turnstile count at the front door continues to show the dramatic increase in building use that began two years ago when we renovated the main floor. This year more than 375,000 people entered the building, an average of more than 1,100 people each day the building was open. This measure of use is up more than 11 percent over 1996/97 and more than 45 percent over 1995/96.

To the staff, the Library feels busy because it is. The only notable decline in use is in the number of items borrowed by Bates users on interlibrary loan. This will require some study, but it reflects our efforts to cancel lesser-used periodicals and purchase journals that are heavily borrowed from other libraries and to purchase access to full-text electronic products available 24 hours a day. We expect the direct links we are building to CBB Libraries will result in increased borrowing as holdings of Bowdoin and Colby become more visible.

Staff continue efforts to reach out to users through liaison, user education, collaboration, and publicity. Through handouts, Web notices, e-mail, reports in the *Daily*, the *Student* and on WRBC, we provide constant communication about what we are doing. This was particularly important in publicizing the plan to close the Library for renovation.

We continue efforts to be responsive to user needs in the collections we build. We conducted another annual serials review, identifying some \$9,000 in cancellations that will be used to add serial titles more in keeping with current needs. Despite popular expectations that electronic materials will replace print, the trend in the market toward electronic collections is a slow one. Most periodical indexes we purchase are accessible to

Bates users via the internet, and this year the beginnings of a trend toward electronic journals is evident (though they usually come at a higher price than their print counterparts).

Kurt Kuss began conducting a systematic review of scope and purpose of Special Collections. This review has resulted in changes, clarifications in emphasis, and revised policies for use. Notable acquisitions include the papers of Dorothy Freeman (including her correspondence with Rachel Carson); the papers of John Tagliabue; and the book collection of Leon Tebbetts. Kurt's efforts are resulting in enhanced emphasis on exhibits, publicity, and outreach for Special Collections. We expect this work will result in increased visibility and use of Special Collections materials, and will require us to resolve jurisdictional issues related to responsibility for collecting the College's archival materials. Accomplishing this clarification is one of major goals for the coming year.

At the beginning of the year, I made some changes in the reporting structure and administrative communications. I formed an Administrative Group comprised of heads of the major library units and made changes in the reporting relationships for acquisitions, cataloging, bind and mend, government documents, reference, and interlibrary loan. I believe these changes allow me to have a better picture of Library-wide activity, and put us in a position to make higher quality decisions. I need to continue to improve communication about policy discussions and changes, and improve the flexibility and responsiveness of administrative decision making.

The President approved a permanent additional full-time position in Audio. We had used temporary positions for two years to see the effect of additional adult supervision in the evenings and on weekends. The result of this addition is better service to users, more effective supervision of student workers, and fewer problems to clean up every morning.

We changed vendors for binding, with significant cost savings. We worked with Sarah Potter to develop a new photocopy contract as part of the campus-wide contract. We completed a photocopy cost study, which revealed a structural budget deficit in photocopy operations. To fix this, we raised the price of photocopies and eliminated the charges for microform copying, and now are ending the year without a deficit. The overall goal continues to be to provide a photocopy service that does not draw on College revenues. This situation will need to be monitored in the coming year, as we believe we will begin to be charged for maintenance on debit card equipment. We would still like a one-card system to help us eliminate our stand-alone debit card system for photocopies.

Staff departures have left some significant gaps in experience and expertise. Katherine Kott left in January to take a position with Innovative Interfaces, Inc. Sean Galipeau left in June for graduate school at Orono. Steve Abbott also left in June for a position in Minority Affairs at Dartmouth Medical School. There have been welcome additions. Brenda Reynolds served in a half-time temporary position in Acquisitions to fill in for Carole Parker, who extended her ability to manage child care responsibilities by going to half-time status for the year.

In the coming years we will continue to face four major management challenges. The first is the need to manage the transition to an electronic collection. Our budget planning, our building plans, and our emphasis on consortial activity are all responses to this

challenge. The transition will be slow, but we must be prepared to make every change we can to keep up with it. The second is the need to finance a growing collection. All indications are that electronic media will make materials available to Bates that have never been available before, but they will continue to be priced according to the same commercial business models that have given us double-digit inflation for the past 15 years. The third is the challenge of making the rapidly-expanding collection available without corresponding increases in staff. Our processing activity continues to grow, and we must find ways to do it that take advantage of technology and our capacity to purchase records and services as well as materials. The fourth is the need for staff development to make the best choices we can, learn new techniques and develop the skills and expertise to manage for the future.

This has been the most hectic and most productive year since I joined the staff of the College in 1994. Our efforts to buy and process more materials, provide expanded services over extended hours, and to extend our reach with Campus-wide and world-wide electronic services have caused us to stretch and grow. As we deepen our ties to Colby and Bowdoin libraries, and continue to build relationships with information services operations on all three campuses, the strength of the staff in delivering high quality service, and the depth of their collaborative skills, will be key ingredients to success. I am very proud to be a part of this effort.

Respectfully submitted,

Eugene L. Wiemers
Librarian

June 16, 1998

Progress on Goals for 1997/98

The staff of the Library consistently attempts to evaluate and improve the services to students, faculty and staff. In 1997/98 we identified the following areas as those that require particular attention.

- World Wide Web. Improve use of World Wide Web as a tool to provide services and information about the Library. This includes finding better ways to coordinate and administer the Library's web services, creating a structure for Web services that individual library units can build upon, and assign to an individual the responsibility to oversee the Library's web pages.

We determined in the fall that the most effective use of funds coming from the Mellon Foundation grant to help us release staff effort to work on CBB activities would be to engage an outside consultant to help us rethink our Web services. We hired Argus Associates, Inc. of Ann Arbor, Michigan, who specialize in the organization of information on the Web. They met with a team that included Library and Information Services leadership and made recommendations for complete redesign of the Library web site. An implementation team is in the process of taking the recommendations, changing them as needed, and redesigning the Web site for August release. At the same time, we are implementing the Innovative Interfaces WebPac to put the Library catalog on the Web. The two efforts are being done in coordinated fashion. Assignment of ongoing responsibility for Web management will be done next year.

- Electronic reserves and copyright. Explore in depth the potential to implement electronic course reserve systems. This includes looking for solutions to obstacles presented by interpretations of copyright law. Work with the Bookstore, Secretarial Services and others to clarify Bates copyright policies, to explore how purchase of course packs affects demand for course reserves, and find ways to streamline the process of seeking copyright permissions.

The Librarian and Head of Circulation spent some time this year investigating the current state of electronic reserve systems. This included a review of copyright issues, which revealed that there are relatively minor changes we could make to get our practices in line with institutions that are doing electronic reserves. It also included site visits to two locations currently doing electronic reserves (Northwestern University and Wellesley College). The visits suggest that it is not the right time to push development of electronic reserves. There are serious doubts about the Innovative Interfaces product. Although it would be relatively easy to implement, other users report severe limitations in flexibility, especially for printing. A different solution using more generic software will require further study.

- Access mechanisms. Assertively explore options to improve the ways access can be improved or extended. Can we handle particular formats in a different way? Find a way to look at processing priorities and choices in a library-wide way, in order to extend control over materials such as Special Collections. Systematically explore trade-offs in access options.

We learned a lot this year about alternatives for processing materials. We completed the project with OCLC's Techpro division to catalog the backlog of audio, video and scores. A full evaluation of the experience is underway, but preliminary results suggest that for sound recordings, we can purchase very high quality catalog records that require a minimum of on-site processing. Results for scores are comparable. The experience with video appears to be more mixed, as the generally-used standards for video cataloging are such that cataloging we purchase from OCLC (much of it having been originally done for public library entertainment collections) may not be adequate for scholarly use of this material.

Renee Phelan and Sandi Groleau developed a profile with Marcive, Inc. to purchase catalog records for U.S. government documents. Delivery of these records began in April. This will allow us to extend full cataloging to all documents we receive on the depository program, and will greatly extend accessibility to these materials. It is too soon to see what impact this change will have on the staff's ability to take on other work. This process only applies to current receipts, and we will need project funding to purchase records for the materials we received between 1976 and early 1998.

Acquisitions and Cataloging staff are currently developing a profile to purchase catalog records for the materials we receive on approval from Yankee Book Peddler. If the implementation is successful and records meet acceptable standards for quality, we expect to expand the program to include other materials from the same vendor, and eventually other vendors as well. In addition, we will work with YBP to have materials sent with physical processing as well (barcodes, call numbers, etc.) in order to reduce the local labor requirements to get them to the shelf.

We took steps to integrate access for electronic resources with other materials by cataloging the electronic journals to which the Library has subscriptions. This experience raised many questions regarding the appropriate place to enter records for electronic materials, and the standards and practices that should be used to accomplish this work. We made some progress as part of the Web design work in sorting out some of the issues, but we will need to spend some time and some planning in the coming year to clarify where we expect users to find access points to electronic materials, and how we will make the right access available.

We developed a procedure to add the records for Evans Early American Imprints microfiche set. This was a logistical and operational task of considerable size, since the record set we received with the microfiche set was roughly equal to the number of records we add in a typical year. We determined that it was important to load the records within the authority structure of our existing catalog, and as the number of Evans records grows, the quantity that can be added every day also grows. We should be able to finish the load in the coming few months.

A goal for the coming year is to use the results of these experiences to develop ways to align processing priorities to Library priorities and assess our opportunities to assign staff whose time, when released from routine processing, can be devoted to more complicated or more locally-oriented processing needs.

- Building. Complete plans for building renovations and prepare for summer 1998 moves.

Plans were completed and approved to do the largest portion of the renovation project in the summer of 1998, and to complete the project in the summer of 1999. This has been an intense process for the entire Library to plan for and accomplish this move. It is very gratifying to see it done. We have closed the building for the summer of 1998, placing a hardship on the summer academic enterprise. Staff were careful to prepare the user community well in advance for this effort, and we sincerely regret the inconvenience this has caused to many users.

- CBB. Implement CBB strategic plan and Mellon-supported projects. Includes more robust connections among libraries, joint user-education programs, videoconferencing systems, cooperative collection development and shared storage.

Full reports on this activity are posted on the Web at <http://www.colby.edu/cbb/info-coop/>. We are on schedule for all the specific activities envisioned by the Mellon grant, due to the high degree of effort and professionalism of all involved. In addition to grant-funded activities, new groups for Electronic Collections and Collection Development were formed with revised charges and working expectations. We have made a concerted effort to set expectations for CBB group work in such a way that the results get communicated and implemented. We expect Colby, Bates and Bowdoin will be doing business with each other in increasing arenas for the foreseeable future, and we want to develop ways to reduce some of the confusion that almost inevitably accompanies collaboration.

- Statistics. Take ground-up look at statistics needs. What do we gather, and why? Find ways to reduce overhead in statistics gathering.

We appointed a Statistics Task Force, which is looking at ways to gather as much information as possible from the automated system, and looking at ways to standardize all statistical reporting. A report is expected by the end of the summer.

- Instruction. Continue to expand instructional programs, with particular attention to basic information skills and programs for faculty members and first-year students.

Our instructional offerings continue to expand. This year, more than 100 sessions reached almost 1,600 students, with particular attention for first year seminars. Compared to the previous year, this represents a 50 percent increase in the number of sessions, and 100 percent increase in the number of students reached. This effort is coordinated with a similar effort in Information Service for instruction in software and tools. We also conducted a successful search for an Instructional Services Librarian, who will join the staff in July. We expect that this program will continue to grow in sophistication and effectiveness as well as in numbers.

Reference staff also continue a very successful program to meet individually with faculty members in their offices. To date they have seen more than 100 faculty members, and taken the opportunity to work on technology issues, content issues and other concerns about library services available to faculty members.

The pace of change requires additional training efforts for staff in order to keep up with information we need to pass on to users. Reference and Public Services meetings are now frequently used for staff talks on new databases, new search techniques, and new or changed (sometimes not improved, unfortunately) software that all staff who serve the public need to be aware of.

- Student training. Continue efforts to provide cross-training in multiple functions, and work to establish minimum expectations for things student workers should know. Both efforts will aid in backing up each other's work.

Training for student workers in public services and in technical services is now intended to provide a broad view of the work and assure some common skills. When we plan intensive training in the fall for new student workers, we will continue to strengthen this effort.

- Staff development and morale. Provide staff with time to explore new ideas and initiatives. Find ways to express priorities in such a way that this can happen without creating the impression that staff are neglecting their work.

This is an area that continues to need work. The effort to plan and implement building renovations, plan and implement new CBB services, and plan and implement a new Web site for the Library are examples of very intense work that has drawn staff away from what might be considered "normal" duties. This work has created a sense of shared mission and shared pride, but continues to be stressful for all the individual involved

One staff member observed as the Web implementation team was formed that working on projects with limited numbers of people and firm deadlines is not the normal way most library work gets done. The norm is to offer stable services that get changed incrementally as new techniques are found. One challenge for this organization will be to try to blend these two ways of working. We continue to provide wide and varied opportunities for staff to travel to bring new ideas back to the Library, and to provide on site training when appropriate.

- Staff policies and procedures. Clarify basic policies by completing review of policies and procedures manual.

This review was finished, and a completely revised, shortened, and improved *Library Personnel Handbook* was approved in the Spring. The Personnel Committee made concerted effort to finish this work, and did a great service to the Library by completing this difficult work. We undertook to get Goals Review on schedule this year, with some success. I also worked with each staff member to review his or her personnel file, and then transferred all personnel files to the Personnel Office.

Goals for 1998/99 and beyond

Consistent with the practice we started for 1997/98, organizational goals are expressed as a relatively short list that does not encompass everything we do, but rather focuses on a limited number of ideas, projects and programs that we really want to emphasize. This year's assessment of goals expressly included a review of Goals 2005 materials. Some of the goals expressed here are goals that will by their nature take more than one year to complete. We expect the strategic planning effort we undertake in the coming year will make the relationship of long- and short-term goals more explicit.

- **Processing.** Institute an organized way to make and express choices about processing of library materials on a Library-wide basis, and to link those priorities to organizational and college priorities.
- **Management.** Strengthen department/unit management. This entails getting decision-making to lowest appropriate level. This may involve workshops, training, and other steps to improve decision making in the library, and to clarify decision-making processes. Support creativity, courage, broad communication and consensus. Promote qualities we want to encourage, including creativity, professionalism and flexibility.
- **Implement and publicize major changes in the building and in Library services.** Get the Library put back together in the fall. Install and promote WebPac. Promote CBB circulation system.
- **Strengthen link between Library collections, services and the curriculum.** Blend concepts of just in time and just in case in order to provide information support for increasingly diverse curriculum. Develop the idea of the Library staff as having a role in the educational process - as educators who take responsibility to be educated and keep an open mind about education. Broaden the vision of the curriculum and strengthen the Library's role as an agency that transcends boundaries and supports a broad concept of diversity.
- **Develop close connections with users.** Direct instructional efforts to what students need as individuals. Find ways to connect with academic advisors. Get early connections to thesis writers. Develop mechanisms for organized consultation with users. Develop feedback mechanisms for users to comment on the Library.
- **World Wide Web.** Install new web site. Provide needed level of staff support.
- **Strengthen collaborative work with CBB.** Collaboration with others is essential to the future of the College and the Library. Review CBB strategic plan and objectives to make needed changes, and assertively proceed as outlined. Use this as an opportunity to learn how to do collaborative work.
- **Gifts and materials not purchased.** Develop and implement a policy for selection, acquisition and processing of materials (physical and electronic) that are available to the Library but not purchased. Attempt to clarify the preferred mode of access (catalog or some other Web link) for electronic materials of various types. Develop

procedures that enable smooth implementation of these policies, and provide for change over time as electronic access possibilities change.

- Staff development and recruitment. Work on strengthening efforts to attract and retain a diverse staff. Work to integrate new staff into the organization. Continue to emphasize staff development opportunities for all staff, and to foster a sense of shared commitment to each others' success.
- History and culture of Bates. Plan for the archival needs of the College, working with other appropriate offices on campus. Support and promote projects and programs designed to use existing materials and/or create or acquire additional materials that document the history and culture of the College.
- Information services/information technology plan. Work with Information Services, faculty, and staff groups to develop a strategic plan for information and information technology support for the College. This should be a long-term plan, developed with users and driven by user needs, including training, hardware, software, networking and content.
- Assessment. Pay attention to the need for assessment as a normal part of everyday work.