ANNUAL REPORT, FY 2000
July 1, 1999 – June 30, 2000
THE LAMAR SOUTTER LIBRARY

Highlights

A team-based structure continues to be the mechanism for generating ideas and accomplishing tasks in the library. At the staff library retreat in August 1999, the previous year's accomplishments were reviewed and plans were made for building on them. In addition to the teams convened to develop action plans for goals set at the retreat (Customer Service, Staff Development, SoutteReview, Outreach and Website), departmental teams were formed to discuss and develop plans for customer service initiatives. Standing committees for Collection Development and Search and Screen were also formed. Three new task forces were also announced. One group discussed the proposal that we combine the Reference and Circulation areas into one working area; the second group investigated possibilities for changing the methods of delivering photocopy services in the library. A third group explored the possibilities of implementing kiosk technology in the library. The first task force completed their task and issued a final report; the work of the second task force is ongoing; the third task force submitted a final report that has been passed on to an implementation team formed for FY2001.

A new integrated library system was implemented at the end of FY99. During FY2000, library staff began to incorporate its features into their daily workflow. The system selected was Endeavor's Voyager product. The entire library staff worked together to make the system a success.

The decision that had the greatest impact on the workflow of all library staff was that the library would respond to a National Library of Medicine RFP for the Regional Medical Library Program. In addition to the accomplishments discussed in this report, planning and work was ongoing in preparing and writing the best proposal possible in response to this opportunity. On June 30, the Lamar Soutter Library proposal was received at NLM.

Administration

Building the virtual library collection, enhancing online reference resources and services on the web, reaching out to Massachusetts healthcare professionals and consumers and beyond, and enhancing customer service continued as administrative directions for FY2000. Today knowledge and information are available in both digital and print formats. During FY2000, we continued to plan, organize and maintain both formats and provide both basic library services and enhanced online and digital services. In order to accommodate information in both the print and online worlds, electronic collection expenditures grew by 53% from FY99 to FY2000, professional staff has nearly doubled since FY98, support

staff increased by 5% from last fiscal year and collection expenditures increased by 20% since last fiscal year. In addition, with medical school administration and faculty support, the library embarked on a year-long space study which justified the need for a new, larger, more technology friendly physical library space that will better meet the needs for collaborative learning, informatics research and digital library initiatives. The medical school administration allocated funds for a renovation project to begin during FY2001. The badly needed renovation will help the library continue to offer a high level of services in its present physical space until a new library can be built.

The Administrative Customer Service Initiative was identified. The group's goal is to investigate and report on communication methods utilized by library staff and users both inside and outside of the Medical School community.

Access Services

The Access Services department conducted regular meetings to brainstorm ideas for a customer service plan and after much discussion agreed on pursuing the need for a public microfilm/microfiche reader/printer. Access Services is comprised of Circulation, Interlibrary Loan, Document Delivery, Photocopy Services and Stacks Maintenance.

The Circulation module of the new Integrated Library System was implemented on July 6, 1999, at the beginning of the fiscal year. While planning and staff training had occurred prior to implementation, throughout this year, staff were empowered to find creative solutions to new problems that occurred every week. The Circulation module was made more difficult to implement when we learned in May that the previous system's patron records would not be moved into the new system. This required that all patron records be recreated in the new system.

In addition, plans for the Boston Library Consortium's Virtual Catalog project were announced and the library was selected to be included in the second phase. Throughout the Spring of 2000, meetings were held and plans made for a smooth transition to implementation of this product.

Circulation continued to experiment with checking out laptops to students and fielding questions about this service.

The Reference Department's Access database used for recording reference questions was made available to Circulation staff. Training for the proper use of this database helps to provide accurate statistics for the numbers and kinds of reference queries that are received in the library.

Both the Interlibrary Borrowing and the Document Delivery groups worked to prepare for changes in Docline, the National Library of Medicine Interlibrary Loan product.

Reference Department

The Reference Department participated in a variety of activities and programs designed to improve services and reach out to our community of users. As our resources increase, we have been able to become more active with groups outside the library and respond to the changing needs of the researchers and clinicians. The Reference Staff have been members and contributed to the work of the teams and Committees operating in the library.

A new Access database was implemented for tracking Reference questions and interactions. The database offers a flexible approach, identifying patron and question types and resources used. Reference staff participated in the planning and design phase and developed training for the Circulation staff's implementation of its use. Reports can be generated providing a summary of Reference activities.

The Reference staff works as liaisons to several departments throughout the medical school. Ellen Barry worked with Pediatrics, Jim Comes worked with Physiology, Gael Evans worked with Psychiatry. Paul Julian worked with the School of Nursing, Judy Nordberg worked with Cell Biology and the Center for Adoption Research, Peg Spinner worked with Biochemistry/Pharmacology and Bob Vander Hart worked with MGM.

A user survey was developed and distributed to faculty, staff and students to determine current user needs. Results will be analyzed to make recommendation for future services and to enhance current services. Preliminary results have been reported to the SoutteReview.

A monthly calendar was published publicizing classes on MEDLINE, Microsoft Mail and an Introduction to the Internet. New classes this year were PowerPoint and EndNote. The staff participated in the Residency Orientation Program. These sessions introduce new residents to library resources and services. Staff also participated in the orientation programs for First Year medical students, Graduate School of Biological Sciences students and Graduate School of Nursing students. At the third year level, medical students receive an additional review of library electronic resources and an introduction to the Evidence Based Medicine Literature. The Reference staff offers summer workshops, supporting summer programs from the Office of Minority Students and the Research Office (Summer Enrichment Program and High School Health Careers). Staff also participated for the first time in co-teaching a course on grant writing to faculty.

Planning began for two new programs to be implemented in FY2001 – EBM for Pediatrics in which a librarian will attend morning report and train residents to search the literature and Faculty Computer Bootcamp where library staff will co-sponsor classes for new faculty. Plans to expand EBM for Family Medicine third

year clerkships were initiated when the library received word that it had been a co-recipient with Family Medicine for a Macy Grant.

The department's customer service initiative was the implementation of a training program for EndNote, a bibliographic management tool used by researchers and students.

Technical Services

The Technical Services group was greatly impacted by the implementation of the new integrated library system during the summer of 1999. The cataloging, acquisitions and serials modules were all implemented by staff. This implementation resulted in increased information about the collections being available to library users in the online public access catalog. Serial issues, holdings information and bindery information are readily available for users to browse. Additionally, order information about books is also available.

Staff also made the decision to "freeze" the library shelf list, a record of all items owned by the library filed in call number order. With new and more accurate information available in the integrated system, it was decided that continued work in the shelflist was redundant and that time will be better spent in creating more accurate online records for library use.

Expanded electronic collections added e-books with MD Consult, Stat!Ref and more electronic journals such as Elsevier's Science Direct and Academic Press's IDEAL collection.

Technical Services' Customer Service Initiative was defined as demystifying tech services. A variety of meetings and reports directed to library staff will enable customers to learn more about tech services issues will be developed in the next year.

Systems

Supporting all activities of the library, the Systems Librarian works with Information Services to insure access to appropriate hardware and software to accomplish their work. In addition to creating a smooth transition to the new integrated library system, the Systems Librarian has also implemented two upgrades to the system.

Working with IS, many electronic mailing lists were transferred from listserv software on an old, library based machine (papaya) to a server with new software in IS.

Other projects have included the Virtual Catalog planning and implementation, training and installation of Cold Fusion (website) software, development of a

Reference question tracking database and development of a database for the International Health Opportunities (IHOC), evaluation and selection of kiosk technology and continued implementation and support of the wireless network and student laptop loan project.

Teams

Nearly all library staff participated on a team, a committee or a task force. Throughout the year, team-sponsored activities gave staff opportunities for both learning and enjoyment. Selected accomplishments of the various teams included a very successful Open House and Family Day Picnic events (Outreach Team), shadowing opportunities (Staff Development), four newsletter updates (SoutteReview), customer service training opportunities (Customer Service Team), moving the unbound journals to the first floor (Customer Service Team) and a new website implementation (Web Team).

Clinical System Library Services

The library worked to provide a bridge from Lamar Soutter Library services to our fourteen clinical system partners and their libraries. In collaboration with Katie Pryor, Clinical Affiliate Representative, librarians from the clinical system were invited to quarterly meetings to discuss needs and issues in their libraries. One project which grew from these discussions was a plan to implement the Endeavor Integrated Library System (Cataloging module) at interested sites. Library staff provided training and support as well as computers, monitors and printers to the seven participating sites so that they could add information about their book holdings to the online catalog.

A contract for consultation services was completed with Heywood Hospital. Under the contract, a Lamar Soutter Librarian visits the Heywood Hospital librarian once each month and works with her on projects including plans for an Open House, surveys for library users, help with installation and upgrades to the Endeavor system and follow-up training and collection analysis to help determine what to keep in a growing collection.

During the year, discussions took place between Lamar Soutter Library staff and clinical system librarians regarding database access for libraries in the clinical system. Databases and products were identified and negotiations with vendors were negotiated.

Problems Solved

The integrated library system enables library staff to provide more complete and up-to-date information to library users. With more information in one place, staff adapted quickly to using the system to learn which journals are available in the

library and other previously hard to find information. OVID users can link directly to QUIN to check library holdings. There is also better control of information prior to cataloging.

The space crunch in the library was alleviated somewhat when unbound journals were moved from the stacks to the first floor in October of 1999. Library customers also like the idea that they don't have to roam the stacks to find that current article that they are looking for. Reports from customers are that they really appreciated this old feature which has been returned to the library.

With the explosion of new databases and new electronic products, a new website was very important for library users. The Web team learned a new program (ColdFusion) and implemented plans for a new, more user-friendly website. User testing prior to its release helped to refine the site's look and feel.

Statistical Information

	FY98	FY99	FY00	FY99/FY00 Percentage Change
Total volumes in Library collections	258,800	264,714	270,123	2.00%
Books	38,306	39,886	41,466	4.00%
New titles added	1,709	1,580	2,884	45.00%
Journal subscriptions	1,659	2,101	1,935	-8.00%
Number of volumes bound	5,959	4,254	4,713	10%
Library Visitors	380,732	425,836	389,682	-9.00%
Service Hours	106.5/week	106.5/week	106.5/week	
Registered borrowers	5,825	N/A	2,163	2000.00%
Items borrowed from the library	25,595	20,706	16,432 (9112)	-26.00%
Items used in the library and reshelved	200,826	149,181	183,579	19.00%
Items borrowed for LSL patrons	1,754	2,042	1,620	-26.00%
Document Delivery Requests	34,529	22,715	30,591	26.00%
Filled Requests	26,626	17,152	24,653	30.00%
			Note : 80% fill rate	
Reference				
Questions answered	16,291	15,147	15,365	1.00%
Training class attendance	966	756	681	-11.00%
Orientation attendance	1,160	925	655	-41.00%
Staff				
Professional	7	13	13	
Support	17	19	20	5.00%
Hourlies	6	5	5	
Total	30	37	38	3.00%
Expenditures				
Books	70,000	138,000	128,000	-8.00%
Journals	973,000	1,067,000	1,138,000	6.00%
Databases	$126,000	258,000	548,000	53.00%
Total	**$1,169,000**	**$1,463,000**	**$1,820,000**	**20.00%**

Goals, FY2001

Five Year Goals

Goal 1. In conjunction with other University of Massachusetts campus libraries, develop a digital library.
a) Submit an UMass Information Technology bond proposal
b) Hold a planning retreat
c) Form Implementation committees
d) Receive funding
e) Committees make recommendations for fund allocation
f) At the end of Phase One, license databases selected by committees
g) Develop and implement information literacy and reference desk projects
h) Write proposals for future funding

Goal 2. In conjunction with the Boston Library Consortium, participate in the Virtual Union Catalog project. Funded through a proposal to the Massachusetts Board of Library Commissioners, the initial participants have been identified, trained and profiled. The Lamar Soutter Library is one of the libraries in the second group.
a) In conjunction with Group Two (UMass-Dartmouth, UMass-Lowell and UMass Medical School), profile for URSA software, train and test for implementation
b) Implement the Virtual Catalog (book) borrowing and lending with other BLC library participants.
c) Evaluate the project
d) Seek future funding to expand the Virtual Union Catalog funding.

Goal 3. The library will develop and implement a plan for fundraising.
a) The management team will hold regular meetings to discuss developing a plan for library fundraising.
b) Research on fundraising for libraries will be conducted.
c) The management team will brainstorm the elements
d) A plan outline will be prepared and presented to school administration
e) Based on school administration feedback, the plan will be revised and submitted to school administration for approval.
f) An implementation plan will be developed and approved.

Goal 4. The University of Massachusetts Medical School was formed nearly thirty years ago. There are currently no archives for University information. The library will develop and implement a plan for a school archive and records management or knowledge management program.
a) An archivist consultant will be hired to conduct an assessment of campus archival records and knowledge management needs, including space, equipment and personnel.
b) A proposal will be developed for presentation to University administration.

c) After approval, a campus-wide committee with strong library representation will be formed to implement the consultant's recommendations/committee proposal.
d) An archivist/record manager job description will be developed and presented to Human Resources for approval and recruitment.
e) Space will be designated and developed to house a university archives either in the library or in an appropriate space on campus.
f) A campus-wide call for archival materials will be made, with particular focus on employees and staff who have been affiliated with the institution for more than 20 years. Additional efforts to contact retired faculty and administrators will be made.

Goal 5. Continue to identify space needs of the Library
a) Work with Medical School administration to complete the space study.
b) Agree on priorities for minor renovation.
c) Implement minor renovations plan.
d) Begin working with architects to plan a new library building.

Year 1, Specific Objectives with accompanying related activities related to five year goals :

Objective 1. Establish and maintain channels for effective communication. Communications mechanisms include:
a) Publish and distribute a newsletter (the SoutteReview) in print and electronic formats to communicate important information about library programs, policies and procedures.
b) Establish, maintain and use electronic lists for sharing information with library staff, library users and colleagues.
c) Develop and maintain a library website
d) Produce factsheets, articles, FAQs, etc. to keep users up-to-date about services provided by the library
e) Develop working relationships with other libraries and relevant organizations by identifying common program interests and goals, working to develop regular lines of communication and developing appropriate cooperative programs.

Objective 2. Obtain ongoing feedback from users about their information wants, needs and uses, and recommend ways of improving health professional and consumer access to information
a) Conduct or participate in needs assessments or surveys of users and non-users of library services.
b) Analyze data
c) Use data to revise or add services and prepare budget requests.

Objective 3. Collections Development Committee is to advise the Collection Development Librarian on collection policies, strengths and weaknesses
a) finalize written policies, recommend print and electronic titles for purchase
b) conduct collections analysis projects for selected subject areas.

Objective 4. The Photocopy Task Force will examine the current photocopy services and make recommendations for the future without introducing money (cash) management by library staff into the process.

Objective 5. The Kiosk Implementation Task Force will purchase, configure and install the Information Kiosk in the Lamar Soutter Library first floor area by the April 2001 Open House. The content report issued by the Customer Service Team will be used as a guide for designing the content pages.

Objective 6. The Web Technical Group will continue the development and maintenance of the Library's Website using ColdFusion software.
a) They will investigate the feasibility and design of a staff intranet.
b) They will investigate the design and feasibility of "personalization".

Objective 7. The Outreach Team will plan and implement the annual Library Open House and Alumni/Family Day events.
a) The Team is strongly encouraged to use the same format and materials from past years and not reinvent the wheel each year.
b) The Team will focus its energy on discussing, planning and writing a report which details the Lamar Soutter Library services to off-campus members of the UMass Medical School community (Auburn, Jamaica Plain, Shriver, Shrewsbury, clinical faculty and other groups as identified) and make recommendations for future services. The Team should identify the various user groups and create a service plan.

Objective 8 : The Staff Development Team will coordinate the library's staff development program.
a) The Team will plan, schedule and implement regular training classes
b) The Team will continue the production of the Insider.
c) The Team will create a New Employee Handbook
d) The Team will develop and implement a New Employee Orientation program.
e) The Team will clarify and outline the library's security and safety policies and procedures as part of the Handbook development process.

Objective 9. The Marketing Team will identify a process for marketing library services to UMass users.
a) The Team will identify marketing opportunities and develop a written action plan. The plan should focus on publicizing the library's resources (especially online databases) and increasing the UMass community's awareness of library's collections and services.
b) The team will propose ways to advertise the library's proxy server.

c) The team will develop a consistent look and feel to library publications.
d) The team will make suggestions for regular library exhibits.

Objective 10 . The Management Team will address the following issues :
a) Library signage which directs users to services and materials which they seek
b) A methodology for gathering use statistics for library products and services, particularly electronic services.
c) Research the development of a Library Friends' Group
d) Develop a plan for the use of the Library's Rare Book Room

Objective 11. The library will develop plans for renovation of current space.
a) Work with administration to determine a list of priorities.
b) Work with the facilities department to develop CAD drawings of space allocation.
c) Plan space moves.
d) Implement the plan according to priorities and budget.

Selected Accomplishments, Library Staff

James Comes
Assistant Director, Reference Services

Comes, J, Spinner, P, & Luckmann, R, "Develop Evidence Based Medicine Web Site", Received Grant of $7,000 from Innovations in Medical Education Grants Program, UMass, 1998-2000.

Comes, J, Evans, G, & Spinner, P, "Revise and Update the International Health Opportunities Clearinghouse web site developed at UMass. Received grant of $3000.00 from the Area Health Education Center, UMass Medical Center

Piorun, M & Comes, J, "From a Paper Based System to a Database: Using Access to Track Reference Desk Usage". Poster Session, Medical Library Association Annual Meeting, May 7-9, 2000, Vancouver, BC, Canada

Javier Crespo
Assistant Director, UMass HealthNet

Crespo, J, "The Internet as Public Health Information Tool, Workshop given at Illinois Department of Public Health HIV/AIDS Conference, November 17, 1999. http://www.uic.edu/depts/lib/health/ph/ipb/

Gael A. Evans
Education and Information Services Librarian

Evans, G., Project Manager for a National Library of Medicine outreach grant that brings together seven diverse libraries that disseminate health information to their various constituencies. The grant provides for: collection development at each site, a train-the-trainer class, end-user training on informational databases, and the establishment of a web site for a referral database.

Barbara Combes Ingrassia
Assistant Director, Technical Services

Ingrassia, BC, Worcester Women's History Project, Coordinator for two 5-session courses for Worcester Institute for Senior Education (WISE) for the Colleges of Worcester Consortium, 1999-2000 academic year.

Elaine Russo Martin
Director of Library Services

Grants:

"UMass Teaching Health Centers Connections Project," National Institutes of Health, National Library of Medicine, 4/1/00-3/31/00. $48,522. Elaine R. Martin, PI. To provide high-speed internet access to health information resources and electronic mail at off-campus teaching sites.

"The Worcester Area Community Electronic Information Gateway to Better Health," NIH,NLM, 2/1/00-7/31/00, $39,994. Elaine R. Martin, PI. To develop a health information network of collaborating libraries to serve consumers in the greater Worcester County area.

"UMass HealthNet," Hearst Foundation, 1/31/99-7/31/2001, $186,000, Elaine R. Martin, PI. To create a consumer health network of Central Massachusetts.

"Worcester Area HIV/AIDS Information Network, NIH/NLM, 9/30/98-3/31/00, $40,000, Elaine R. Martin, PI. To create an HIV/AIDS information network for the greater Worcester area.

Publications:
Walton, L., Hasson, S., Ross, F. and Martin ER. "Outreach to public health professionals: lessons learned from a collaborative Iowa public health project" Bulletin of the Medical Library Association, 2000 April; 88(2):165-71.

Hollander, S. and Martin, ER. "Public health departments in the Greater Midwest Region: a profile of connectivity and information technology skills," Bulletin of the Medical Library Association, 1999 July; 87(3):329-36.

Mary E. Piorun
Systems Librarian

Piorun, M, Deborah Sibley, D., Slocomb, M., Laptops: No Dragon Wires with Wireless Technology MLA/CHLA Annual Meeting, Vancouver, B.C. May 9, 2000

Piorun, M., Comes, J., "From a Paper Based System to a Database: Using Microsoft Access to Track Reference Desk Usage". MLA/CHLA Annual Meeting, Vancouver, B.C. May 8, 2000

Deborah H. L. Sibley
Deputy Director

Medical Informatics MBL/NLM Course Fellow - Marine Biological Laboratory, Woods Hole, MA. Sponsored by the National Library of Medicine. Certificate, Spring Course, 1999.

Sibley, D, Piorun, M; Slocomb, M, "Laptops : No Dragon Wires with Wireless Technology," MLA Presentation, Vancouver BC, May, 2000

Sibley, D, Slocomb, MA : Professional Development Grant in Instructional Technology for Academic Development from the University of Massachusetts President's Office. "Library Document Delivery and Distance Education Support".   May, 2000 - May, 2001

Mary Ann Slocomb
Assistant Director for Access Services

Sibley, D, Piorun, M; Slocomb, M, "Laptops : No Dragon Wires with Wireless Technology," MLA Presentation, Vancouver BC May, 2000

Sibley, D, Slocomb, MA : Professional Development Grant in Instructional Technology for Academic Development from the University of Massachusetts President's Office. "Library Document Delivery and Distance Education Support".   May, 2000 - May, 2001

Robert J. Vander Hart
Reference Librarian

Vander Hart, R, "Evolution of an Evidence-Based Medicine (EBM) Web Site," co-authored a poster session presented at the Joint Annual Meeting of the Medical Library Association and the Canadian Health Libraries Association, Vancouver, British Columbia, Canada, May 8, 2000.

Vander Hart, R, "Usability Testing on the Web: Improving an Evidence-Based Medicine Tutorial," co-presented a poster session at the UMass Instructional Technology Conference 2000, Sturbridge, Massachusetts, March 21, 2000.

Vander Hart, R, "Web Technology and Evidence-Based Medicine (EBM)," presentation at "Powerful Learning, Powerful Partnerships: Educating the University Community in a Dynamic Information Environment" symposium, The University of Iowa, Iowa City, Iowa, November 12, 1999.