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Gordon Library’s organizational structure is comprised of five major areas – Administration, Archives & Special Collections, Systems, Technical Services, and User Services. User Services has the largest group of staff, incorporating Access Services (Circulation and Interlibrary Loan), Instruction, and Reference. Technical Services incorporates Acquisitions, Cataloging, Preservation, and Serials. This annual report follows the organizational structure with reports written by librarians responsible for the different areas and includes accomplishments, statistics, and goals.

Library staff deserve great credit for their exceptional efforts this past year. There were many major and minor achievements which ensured the library continued to provide outstanding service to the faculty, students, and staff of WPI as well as cooperating in resource sharing agreements with libraries across the United States.

ADMINISTRATION

Pat Flanagan, Director of User Services and Assistant Library Director announced her resignation in May, 2006 and her acceptance of the Associate University Librarian for Public Services position at Virginia Commonwealth University. A Search Committee was formed. Members of this Search Committee were Helen Shuster, Chair, Donald Richardson, Christine Drew, and Betty Goodrich from the library, Mary Beth Harrity from Academic Technology Center, and John Orr, Dean of Undergraduate Studies. After a nation wide search, Matthew Hall was hired as Director of User Services/Assistant Library Director. His first day was October 25, 2006. Matt was previously the Director of Library Services at Quinebaug Valley Community College in Danielson, CT.

Helen Shuster announced in February that she planned to retire. After discussions with Tom Lynch, VP for the Information Technology Division, Helen agreed to stay until October 31st so that there would not be too long a gap between the time she left and a new director appointed. President Berkey asked Tom Lynch, Vice President for the IT Division and John Orr, Interim Provost, to form a library taskforce to determine a job description for a new Assistant Vice President for Library Services based on their review of existing library services and recommendations for future directions. The taskforce was formed in May and June with a first meeting planned for July and a report due early in A term. The determination was made that Matt Hall would be Interim Director for the gap period.

The library budget once again proved to be a challenge, particularly in the area of periodicals, databases, and books. This year, however, the library did receive an increased allocation of $96,000 for maintenance of existing subscriptions and licenses. Price increases for some journals and databases amounted to 7%-10% and quickly used up most of the new allocation although we were able to find approximately $18,000 for the purchase of new collections and single titles because some costs remained flat from the previous year. Librarians carefully analyzed new requests and distributed the costs as
equally as possible over most academic departments. The book budget actually went over its allocation even though funds deposited with Yankee Book from a previous year were used to augment the allocation. The electronic book collection cost over $100,000, reducing the amount of dollars for print books. A careful analysis of this situation is needed.

Statistics gathered by all library departments indicated growth in all areas except that of the circulating book collection and number of reference questions. Instruction, Interlibrary loans, Tech Suite and Laptop usage, electronic journal, database, and e-books uses were all up from the previous year. This shows clearly that the library is well used by the WPI community and that library staff are needing to handle a higher and higher workload. Because of this workload additional staff hours were needed. Lapse funds were used to hire temporary librarians to assist in cataloging projects, the Circulation Assistant was given an additional 10 hours a week, and one of the evening/weekend supervisors was hired for additional hours to assist in Reference and Interlibrary loan.

The electronic project pilot continued with the Committee on Academic Policy recommending at the March faculty meeting that projects be submitted electronically beginning in A term, 2007 at the start of the FY08 academic year. Librarians and other staff from the IT Division began work on planning a new e-projects brochure, rewording websites and other information regarding submission of projects, and planning for online tutorials.

ARCHIVES AND SPECIAL COLLECTIONS

The Archives received a $32,000 Library Service Technology Assistance (LSTA) grant from the Massachusetts Board of Library Commissioners (MBLC). The grant will fund the digitization of the Theo Brown diaries, totaling 65 volumes, 23,000 pages. The Archives plans to seek additional assistance from private sources to fund metadata creation and transcription.

The Archives organized, re-housed, and cataloged 16 unprocessed manuscript collections, approximately 25 linear feet of material. The processed collections include: Charles H. Morgan Papers (MS 03), Rockwell Kent Collection (MS 05), Harold S. Black Papers (MS 09), Mildred M. Tymeson Papers (MS 10), Worcester Engineering Society Records (MS 11), Robert & Esther Goddard Collection (MS 18), Crompton and Knowles Looms Work Collection (MS 20), Zelotes Coombs Papers (MS 28), Leslie J. Hooper Papers (MS 30), and the David & Maria Gitin Collection (MS 34). Printed finding guides were compiled for all of the processed collections.

The Archives converted 7 printed finding guides into Encoded Archival Description format (EAD). The guides for the following collections were converted: Zelotes Coombs Papers (MS 28), Robert & Esther Goddard Collection (MS 14), Jacob J. Hagopian Papers (MS 13), Gleason H. MacCullough Papers (MS 25), Salisbury Family Papers (MS 25), Ichabod Washburn Papers (MS 26), and Worcester Engineering Society Records (MS 25).
11). The finding guides are now available at: http://www.wpi.edu/Academics/Library/Archives/special_collections_list.html.

The Archives recruited three graduate students from the School of Library and Information Science at Simmons College: Amber Moore, Carolyn Child, and Jeffrey Monseau. Amber processed and created a finding guide to the papers of Mildred M. Tymeson (MS 10), the author of Two Towers. Amber also developed a records retention plan for WPI’s Marketing Communications Department. Carolyn processed and created finding guides for the papers of WPI professor of Mechanical Engineering Leslie B. Hooper Papers (MS 30) and David and Maria Gitin literary correspondence collection (MS 34). Jeffrey Monseau researched and provided recommendations on implementing the PDF-A file format standard.

The Archives established the George Gladwin Memorial Art Gallery on the 2nd Floor of the library. The gallery is dedicated space for the WPI community to exhibit their artistic works. Several student exhibits were hosted in the gallery during the year, including the first annual Student Art Competition (see below – Student Art Competition 2007).

The WPI Archives received a donation of a rare letter written by Charles Dickens to Thomas Powell, dated March 23, 1846. The letter was a generous gift of Dr. Martha Crenshaw. Dickens shared a short, tumultuous acquaintance with Powell, who Dickens discovered later to be an embezzler and forger. Dickens in 1849 published a four-page pamphlet describing Powell's wrongdoings. In the donated letter, Dickens writes: "I don't know what the most dangerous letters in the alphabet maybe, unless they are U and I." The letter appears in Volume 4 of the Pilgrim Edition of The Letters of Charles Dickens (Clarendon Press, 1977).

John P. Gagliardo (Class of 1946) donated his collection of 191 photographic images of WPI he took while a student. These unique photographs document campus life in the 1940s as well as the school's Navy V-12 program. During World War II, the Navy V-12 program allowed participants to attend college, complete a bachelor's degree, and earn a commission in the US Navy or US Marine Corps. Mr. Gagliardo was enrolled in the V-12 program.

Curator Rodney Obien along with Professors Kent Ljungquist and Jim Hanlan recently edited and published The History of Woodbury and Company through Peter Lang Publishing Group. The book presents a cleartext of an unpublished manuscript written by Harold Woodbury that chronicles the history of Woodbury and Company, a 120-year old Worcester company and a premier maker of fine engraved stationary. The manuscript was part of the extensive Woodbury and Company archives donated to Gordon Library in 2002 by the descendants of John C. Woodbury, the company founder and a member of the Class of 1876. The book is available through Peter Lang Publish Group.

The WPI Archives & Special Collections recently received the largest donation of Charles Dickens materials since the bequest made by Robert Fellman in 1995 that established the Robert Fellman-Charles Dickens Collection. The donation was made by
Robert Googins, a long-time member of the Charles Dickens Fellowship and a professor of law at the University of Connecticut. The donation includes over 100 of items, including a first edition *American Notes* and a set of original serialized parts of the novel *Bleak House*.

Chris Drouin's essay "Stifled Society: Social Commentary in Number IV of The Pickwick Papers" was selected as winner of the 2007 Robert Fellman Memorial Scholarship Prize. Chris Drouin is an undergraduate, majoring in computer science/interactive media & game design. The Fellman Prize is a cash prize of $500 awarded to the best essay by a WPI undergraduate on the life or works of the British author Charles Dickens. The prize is sponsored by Gordon Library in honor of Robert Fellman, whose world-class collection of Charles Dickens materials was bequeathed to WPI in 1995.

Rachel Katz's pastel Alice's Underwater Tea Party won first place in the 2007 Student Art Competition hosted by Gordon Library and the Humanities & Arts department. Ms. Katz is a member of the class of 2009 and chemistry major. The following are others who placed in the competition: Second Place [Niva Shretha (CS 2008), Paintings, Lily Pond in the Afternoon & Lily Pond and Jo Bridge (CENG 2007), Photograph, Spring]; and Honorable Mention [Matthew Campbell (ECE 2008), Digital Photograph, Little Brook, Justin DiNino (CEE 2007), Mixed Media, Forgotten Port, Jordan Prevé (ECE 2009) Photograph, Remarkable Rocks, and Mansai Varteck (2010), Painting, Ominous Waters].

**Exhibitions**

- Painting Exhibit - Niva Shrestha, *Recent Works*
- Art Exhibit, *Essentials of Art – Student Art Exhibition*
- Print Exhibit, Jackie Ross, *In the Beginning – Monotypes and Monoprints*
- Painting Exhibit, Chinese Painting Guild of Boston, *New Visions: Chinese Landscape Paintings*
- Photography Exhibit, Lora B rueck, *Stones of Ireland*
- Art Exhibit, *Student Art Competition 2007*
- Photography Exhibit, *reaction: Angles of WPI Project Centers*

**Projects**

- IQP, *Ralph Baer:: The Father of Home Video Games*, co-advised Prof. David Finkel & Rodney Obien

**Statistics**

- Reference – 463 (includes email, phone, walk-in, correspondence & fax)
- Documents copied – 723 (includes photocopies, scans, and digital photos)
- Collections processed – 16 manuscript collections, 25 linear feet
- Finding Guides converted to EAD – 7 finding guides
- Interns Recruited – 3 graduate students

**Goals for 2007-2008**
• The Archives will complete the scanning of 65 diaries and create metadata records for each volume and each page. The Archives will continue to seek assistance for funding the creation of detailed metadata records and transcription of the text.

• The Archives will continue to organize unprocessed collection and convert finding guides to EAD. The goal is to process a minimum of 6 collections and convert a minimum of 7 finding guides into EAD.

• The Archives will investigate the possibility of starting two new digital initiatives: Worcester Text Initiative and the Digital Dickens Project. The Worcester Text Initiative, a collaboration with the Humanities and Arts Department, will consider the possibility of digitizing Worcester-related histories and printed works, now out of copyright, and making those works available through Gordon Library’s Digitool software or the Greenstone open source software. The Digital Dickens Project is hoped to be a collaborative project with the Dickens Museum in London to digitize materials from WPI and DM’s collection to make these available through software projects mentioned above. Both projects have the purpose of involving WPI faculty and students in project work as well as providing means for attracting grant funds.

**SYSTEMS**

**Goal:** Explore ways of using Voyager to the fullest extent possible with a view to providing other services that would be useful to both library users and staff.

Two Voyager release upgrades were installed this year, release 6.1 in October 2006 and 6.2 in March 2007. Both upgrades required coordination of activities by Endeavor/Ex Libris, CCC, and the library. The Systems Librarian also coordinated the upgrade of the Voyager ILL system to release 5.5 in October 2006. The Voyager library catalog record display page was enhanced with links to WorldCat and online booksellers. These links allowed users to navigate from the catalog display to other sources of information about items in the library collection. Unfortunately, these links subsequently were removed due to a bug in the 6.2 release. It is hoped that a bug fix in release 6.5 will allow these links to be restored. The Systems Librarian worked with User Services to develop and implement help pages in the library catalog that explain the various catalog “location” and “status” displays. Links to these help pages were added to the catalog record display page. New Global Keyword and Holdings Keyword searches were implemented in Voyager 6.1, opening up greater search options for users and staff. Don Richardson also collaborated with CCC and Endeavor to resolve problems with external patron authentication prior to the 6.1 upgrade.

**Goal:** Monitor, implement changes to ENCompass as needed.

Due to the merger of Endeavor with Ex Libris announced in December 2006, the ENCompass and Curator product lines are being phased out and no further release upgrades will be issued. Support for ENCompass will continue through 2008. ENCompass/Curator sites, such as WPI, will have the opportunity to migrate to DigiTool (the comparable Ex Libris product) sometime in 2008 under the terms of the existing ENCompass license.
Although ENCompass is being retired, the Systems Librarian looked into exposing the Woodbury Collection metadata to OAI (Open Archives Initiative) harvesters and attempted to implement an OAI-PMH (Open Archives Initiative-Protocol for Metadata Harvesting) service on ENCompass. But due to ENCompass incompatibility with parts of the protocol, this attempt failed. Much was learned from this effort, though, and the decision was made to try again after migrating to DigiTool.

**Goal: Investigate alternate non-Endeavor solutions to ENCompass and LinkFinderPlus in conjunction with library staff**

During the year Endeavor plans for ENCompass successor products were monitored by Don Richardson who recommended that non-Endeavor products be evaluated and considered for federated searching and link resolving. After an extensive trial period, and with the input of other staff members, he recommended the adoption of EBSCO LinkSource as WPI’s link resolving product replacing LinkFinderPlus. Following the selection of LinkSource, he collaborated with User Services staff on the implementation, rollout, and branding of LinkSource as “FullTextFinder.” In the 12 months since it was launched LinkSource/FullTextFinder has proven to be a reliable link resolver. In order to provide an ILL request option in FullTextFinder, linking from LinkSource to the Voyager ILL system was created, tested, and implemented. This linking service was not one of the standard ILL service links offered by EBSCO and had to be created from scratch. The Systems Library and the library’s Manager of Instruction and Outreach successfully lobbied EBSCO to create a direct export link from LinkSource to RefWorks. Previously EBSCO did not provide this type of link.

Over several months the Systems Librarian was part of a committee of library staff members who conducted an extensive trial and evaluation of federated search products from several companies. This effort resulted in the selection of WebFeat Express as the federated search solution for WPI. Implementation of WebFeat Express, named “QuickFind” at WPI, began in May 2007. QuickFind was informally introduced to WPI in July 2007, followed by the formal launch at the beginning of term A2007.

**Continue efforts to extract and analyze usage data from Voyager and ENCompass.**

Extraction of library catalog usage data from Voyager continued until the Voyager 6.1 upgrade in October 2006 when data extraction was suspended pending the fix for a software bug in 6.1 that impeded the data collection process. Data collection and extraction resumed in March 2007 after the upgrade to Voyager 6.2. Efforts to extract ENCompass usage data were abandoned due to on-going server issues.

**Continue to collect and analyze data on use of licensed electronic resources and make recommendations for continuation/discontinuation supported by this data.**

Data collection and analysis continues for most of the library’s licensed e-resources. As more and more providers comply with the COUNTER code of practice, it is easier to compare “apples to apples” when evaluating use of resources. In 2006-2007, there were 270,421 searches executed within individual databases and 100,466 sessions commenced.
within either individual databases or within a single provider’s interface. Not all providers report session data for individual databases. Although the total number of searches is lower than last year, the number of sessions has increased.

Top 25 sessions:

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<thead>
<tr>
<th>Database</th>
<th>Service</th>
<th>Sessions</th>
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</thead>
<tbody>
<tr>
<td>WorldCat</td>
<td>FirstSearch</td>
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</tr>
<tr>
<td>Expanded Academic</td>
<td>Thomson-Gale</td>
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<td>Business and Company ASAP+Backfile</td>
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<td>Academic OneFile</td>
<td>Thomson-Gale</td>
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<td>General Business</td>
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<td>Professional Collection</td>
<td>Thomson-Gale</td>
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<tr>
<td>Gale Virtual Reference Library</td>
<td>Thomson-Gale</td>
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<tr>
<td>Health Reference</td>
<td>Thomson-Gale</td>
<td>4819</td>
</tr>
<tr>
<td>Scifinder Scholar</td>
<td>CAS</td>
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<tr>
<td>Business Source Premier</td>
<td>EBSCO</td>
<td>4771</td>
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<tr>
<td>Student Edition</td>
<td>Thomson-Gale</td>
<td>4770</td>
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<tr>
<td>RefWorks</td>
<td>Refworks</td>
<td>4295</td>
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<tr>
<td>Historical Newspapers--New York Times</td>
<td>ProQuest</td>
<td>2658</td>
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<tr>
<td>Wall Street Journal</td>
<td>ProQuest</td>
<td>2613</td>
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<tr>
<td>Web of Science</td>
<td>Thomson-Scientific</td>
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<td>Compendex</td>
<td>EI Village</td>
<td>2183</td>
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<tr>
<td>Oxford English Dictionary</td>
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<td>2167</td>
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<td>INSPEC</td>
<td>EI Village</td>
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<td>America: History and Life/Historical Abstracts Combined</td>
<td>ABC-CLIO</td>
<td>1617</td>
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<tr>
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<td>1008</td>
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<td>PsycINFO</td>
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<tr>
<td>Humanities International Complete</td>
<td>EBSCO</td>
<td>791</td>
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<td>ArticleFirst</td>
<td>FirstSearch</td>
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Top 25 Searches:

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<tr>
<th>Database</th>
<th>Service</th>
<th>Searches</th>
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<tbody>
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<td>Expanded Academic</td>
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<td>Scifinder Scholar</td>
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<td>Business and Company ASP+Backfile</td>
<td>Thomson-Gale</td>
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<td>Infotrac OneFile</td>
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<td>Web of Science</td>
<td>Thomson-Scientific</td>
<td>11237</td>
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Other Accomplishments
The Systems Librarian successfully completed another 2-day certification course offered by Ex Libris in April 2007, “Certification 500: Roll Your Own Voyager Upgrade.” The course provided gave a much greater understanding of the Voyager system and certified attendees to perform Voyager upgrades instead of having to arrange with Ex Libris to do an upgrade. Although the Systems Librarian has been certified to do these upgrades, the preferred approach is still to have Ex Libris do them as they have much more experience with this process and because we are paying an annual maintenance fee that includes upgrade installations done by the company.

Several years ago the library began management of the subscription to the CRSP (Center for Research on Securities Pricing) databases, which are used for research by some Management faculty members. To facilitate regular updates of these data sets, work was done with CCC to allow library staff to manage the installations and updates on the toaster network appliance. A CRSP Web page was also created to assist WPI users in accessing the CRSP data.

In July 2006 the Systems Librarian was invited to present at the New England Voyager User Group Meeting on the topic “Simple WebVoyage Tweaks,” and also was invited by ARC (the Academic and Research Collaborative) to participate on a panel to introduce WorldCat to area librarians who had not used it previously. The topic was “Administrative Module Set Up and Open WorldCat.” During the year the Systems Librarian served as Coordinator of the Interlibrary SIG (Special Interest Group) and moderated the ILL SIG meeting at the final Endeavor User Group Meeting in April 2007.

Beginning in February 2007 a committee was formed with the Assistant Directors for Serials and Collection Management and the Systems Librarian that evaluated electronic resource management (ERM) systems. After collecting data on several products, we narrowed the field to two companies, Innovative Interfaces and Ex Libris. Representatives of both companies were invited to WPI in April 2007 to make presentations. As a result, Electronic Resource Management from Innovative Interfaces was chosen. The contract was finalized in May 2007 and implementation planning began shortly after. It is hoped that the system will be fully implemented by late 2007.
In August and September 2006 the Systems Librarian served as a member of the search committee to find a new Director of User Services, Assistant Library Director. And in October 2006 he coordinated the preparation and submission of the library’s IT Capital Budget Request for FY2008.

**Goals for 2007-2008**
Monitor and implement changes to the various library systems as needed. Keep informed about Ex Libris developments and their implications for the library. Investigate alternatives to Ex Libris products as appropriate.

Successfully implement the new federated search tool in conjunction with library staff.

Take a lead role in the investigation of appropriate software for a WPI Institutional Repository.

Continue to explore ways of using Voyager to the fullest extent possible with a view to providing additional services that would be useful to both library users and staff.

Investigate feasibility of alternate method of remote authentication that would be easier for users to navigate.

Work closely with the WPI Web office and library staff when the library’s turn to implement the Content Management System arrives.

Working with the Assistant Directors for Collections and Serials, complete the implementation of the electronic resource management system.

**TECHNICAL SERVICES**

**ACQUISITIONS/CATALOGING/PRESERVATION**

Besides the normal work of managing acquisitions and cataloging of monographic, standing order, a/v and electronic books during FY07, a major endeavor was the cataloging of WPI IQP and MQP reports in Voyager. Records for the reports were created in Voyager using a series of macros and then the records had to be edited to correct and enhance the information. Approximately 4700 records were created in Voyager. Jackie Mushinsky, Lora Brueck, and Joanne Beller worked on different years, but with all of our regular work, it was difficult to make significant progress. A BiblioTemp was hired in November, 2006, and another in April, 2007, and by the end of June, about 3000 project records were corrected. A decision was made in June to discontinue adding keywords to new projects cataloged from then on.

Another major project of the year was the scanning of the Theo Brown diaries. Preservation Librarian Kathy Markees prepared nine volumes of diaries for scanning. In
a painstaking process, she went through each diary page by page, lifting and re-hinging any add-ins that obliterated text, noting condition, and potential problems for the scanners. Lora Brueck created a metadata scheme and data dictionary based on Dublin Core for web designer Troy Thompson to use during the load of images and creation of brief metadata.

The budget was very tight this year, and was mostly all spent by April. A deposit account with YBP Library Services left over from two years ago was used to purchase book material from April through June. This was the first year the standing order spending (mostly for electronic book collections and single electronic reference titles) overtook spending for print and A/V material. $118,290 was spent on standing orders and $75,040.90 on books and A/V, with an additional $13,000 spent from the YBP deposit, and funds from restricted funds supplementing both electronic and print book purchases.

Activities/Projects/Fulfillment of goals:
- Assisted Access Services department with inventory by creating and running Access reports to change locations of items in Voyager and lists of missing items.
- Collaborated with Asst. Director of Serials Martha Gunnarson and Systems Librarian, Don Richardson in selecting an electronic resource management system.
- Used information on titles requested through in Interlibrary Loan supplied by Laura Hanlan to purchase 79 print titles, totaling $4719.42.
- Created metadata scheme and data dictionary to be used to create basic metadata while bulkloading Brown diary records into the diaries database

Statistics
The average price of print books purchased decreased from $58.48 in FY2006 to $56 in FY06. Reference books, however, were very expensive at $281. Biomedical Engineering was the next most costly at $162.68. Some of the decrease in cost could be attributed to purchasing on Amazon.com where substantial discounts are offered and great deals can sometimes be found from outside dealers on very high priced titles. Whatever decreases were realized in the purchase of print material, however, were quickly eaten up by electronic titles—ebook collections and individual reference titles. As more of our reference collection goes from print to electronic to save space and provide 24x7 access, a greater percent of the materials budget must be devoted to this. Where purchasing a reference work in print is a one-time thing, purchasing it in electronic format can sometimes mean an annual subscription for the same title.

Use of electronic books: Although use of some electronic book collections decreased during FY2006, these collections continue to be very popular. Since there is not complete consensus in the statistics that we receive from ebook vendors, one statistic common to most is “Sessions.” Using this as a basis for comparison, the number of sessions in all collections was 13,184 in FY06 and 12000 in FY07, down slightly (Note: statistics for sessions in netBASE and netLibrary are not available). Books24x7, ebrary, and knovel titles increased usage by around 600 sessions each; safari only about 110
sessions. Usage statistics will have to be carefully monitored in the near future and probably some collections will have to be cut as increases in subscription costs exceed the increase in the budget. Since they are difficult to extract from publishers’ websites and what is reported varies widely from one vendor to the next, it is hoped that vendors will accept and implement statistical standards that can be gathered by our ERM (Electronic Resource Management system).

Complete statistics for acquisitions, collections and use of electronic books are attached at the end of this report.

Goals for 06/07

- Complete retrospective cataloging IQP and MQP reports in Voyager
- Implement ERM for electronic books
- Begin creating descriptive metadata for Theo Brown diaries digitization project
- Continue to monitor use of electronic material with respect to budget issues.

PRESERVATION & END PROCESSING

Expenditures:

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<td>PB stiffening</td>
<td>80</td>
</tr>
<tr>
<td>Laminate</td>
<td>172</td>
</tr>
<tr>
<td>Label/barcode correction</td>
<td>24</td>
</tr>
</tbody>
</table>
**Preservation**
Facilitated donation of two book presses and professional mat cutter from Boston Athenaeum
Improved treatment procedures and retrained students as necessary
Wrote basic treatment manual for training students
Began monitoring of temperature and relative humidity in Collection Management and Special Collections

**End Processing**
Reviewed and rewrote End Processing Procedures
Redesigned End Processing labels for easier identification by Circulation Staff

**Special Collections**
Arranged for talk by Nancy Carlson Schrock, Conservator of Special Collections at MIT on the preservation of nineteenth century bindings, funded by NEH Dickens grant
Scheduled final review of work on Dickens grant by James Reid-Cunningham, Head Conservator, Boston Athenaeum
Negotiated for proper completion of phase boxes provided by Bridgeport Bindery
Completed in-house treatment of Dickens materials specified in NEH grant
Flattened four vellum bindings
Constructed six drop-spine boxes for vellum bindings and Dickens Parts
Treated and prepared 23 volumes of Theo Brown Diaries for digitization

**Disaster Planning**
Created and distributed to staff an in-house Pocket Response Plan (Prep) for disaster preparedness
Inventoried in-house supplies for disaster and arranged for purchase of needed items
Moved disaster supplies to more accessible location

**Committees, Meetings, Workshops**
Attended ARC meetings
Participated on the following committees: dPlan, Workload Measurement Team, Theo Brown Diaries

**Goals for FY2008**

**Preservation**
Acquire small board shear to enable improved quality of work and efficiency
Continue monitoring of temperature and relative humidity in Collection Management and Special Collections
Suggest improvements in mounting items for exhibitions
Collaborate on Sword exhibit for the library’s 40th anniversary
Continue retraining students in improved treatment techniques

**End processing**
Revise what statistics are collected

**Special Collections**
Gather statistics for treatment of Special Collections materials
Identify areas of the collection in need of conservation
Treat and prepare for scanning final volumes of Theo Brown Diaries
Finish treatment on the Woodbury drawings
 Improve shelving for oversized Woodbury drawings
Work with curator to improve storage of framed items

**Disaster Planning**
Attend workshop in August given by Gregor Trinkhaus-Randall
Update PReP as needed

**Committees, Meetings, Workshops**
Identify and attend appropriate workshops and meetings
Continue to participate on the following committees: dPlan, Workload Measurement Team, Theo Brown Diaries

**SERIALS**
The journal collection continues to be one of the most challenging areas in Gordon Library in terms of the constantly increasing costs, the complexity of multiple sources of access to electronic titles, and the maintenance of up to date, accurate information on all of the collections. Most of the electronic collection, which now amounts to a total of 38,480 titles is purchased by publisher bundles through various consortia which can negotiate for lower pricing than a single library. Some bundles such as Elsevier’s ScienceDirect group are negotiated for a multi year contract and others on a single year contract. The multi year contract is a commitment by the University to pay for these...
titles for the 2, 3, or 4 year period but so far this has been approved by upper administration as in the long run it saves WPI thousands of dollars over that period of time. This type of contract is also easier to budget because a set cost is known at the beginning of each fiscal period as opposed to the guesswork of trying to calculate just how much other collections might increase in price. Price increases for most journals and groups of journals are an ongoing problem every year with an average of 7% for the last several years.

Many individual journals are sold in a combination of print and online with some publishers charging for the print and adding on the electronic and other publishers charging for the online version and adding the print. The library’s policy is to purchase electronic wherever possible providing that the electronic cost is not too much more than a print subscription. The statistics which follow this narrative clearly show the decline in print subscriptions which have been reduced from 564 in 2004 to 417 in 2006. These figures include subscriptions which combine the cost of online and print. Print only subscriptions have declined from 411 in 2004 to 242 in 2006. In contrast, electronic journals have increased from 18,585 to 38,581 in the same period of time.

Usage tabulation of the print journal collection shows a constant decline in use of older journals as well as new and includes all usage in its total numbers. Print usage declined from 3,105 uses in 2004 to 1,574 in 2006. Total electronic usage has not yet been compiled but usage from selected publishers shows marked increases for the same period of time. ScienceDirect, for example, had 33,376 accesses in 2004 and 43,280 accesses in 2006. Although the costs for the various collections are expensive, cost per use dollars show a decline in the cost of an access from $7.10 to $6.33. Compared to other journal usage this is one of the library’s most cost effective collections. An interesting comparison to print usage costs shows that a single use of a current print journal in 2006 cost $69.54, up from a print usage in 2004 which cost $48.40 in 2004.

**Goals accomplished for FY2007**

"The library will evaluate existing and new Electronic Resource Management (ERM) tools that will greatly assist in the management of approximately 30,000 print and electronic journals as well as electronic databases. The goal of this evaluation will be to purchase an ERM tool for the library with the approved dollars in the IT capital budget."

EBSCO has developed the following diagram to clarify the extra work involved with electronic journals (and other resources).
A user-friendly overview of what an ERM System should manage:
http://www.ala.org/ala/pla/plapubs/technotes/ermgmt.cfm

Cooperating with staff from Acquisitions and Library Systems, the only two currently viable stand-alone Electronic Resource Management products were evaluated and a decision made to purchase Innovative Interfaces' Millennium ERM.

"Given the issues with Interlibrary Loan not being able to use WorldCat for information about WPI’s electronic serial collection, the Serials Librarian will monitor the OCLC e-journal product supposedly being released in summer 2006 with a view to implementing it so that WPI’s holdings information will appear in WorldCat."

OCLC's free eSerials Holdings Service was implemented in July of 2006. OCLC receives a monthly download of holdings data from our EBSCO A-to-Z list (the Journals List). Using the ISSN, (International Standard Serials Number), OCLC attaches our holdings
symbol (WPG) to matching records in WorldCat. No actual holdings information (i.e., years of coverage available) are added.

"Although the loading of project data is outside the Serials Librarian’s responsibilities she will continue to load data about student projects into the Voyager online catalog."

Projects loading continued as the data was received. 663 bib records were added to Voyager, with the most recent load being in February 2007.

"Continued monitoring of the journal collection is critically important in terms of reviewing usage of titles, analyzing costs, and reviewing individual titles as well as groups of titles for less expensive options."

Monitoring the journals collection continued. Print usage recording has been ongoing. Gathering statistics for e-journal use continues to be complicated and in some cases impossible (American Mathematical Society is notable in this regard, as they flat out refuse to provide statistics). Most publishers provide COUNTER compliant statistics, although implementation of SUSHI remains in the future. Comparison of renewal options was made easier with EBSCO's new online renewal system. Additional titles were switched from print or print + online to online only, providing some savings.

Two significant new e-journal packages were added during the year: Blackwell Publishing Full Collection (785 titles) through NELINET, and Sage Premier (458 titles) through NERL.

Gave presentation on using Macro Express to load project report data into Voyager at NEVUG July 2006 (revised version of one given June 2006 at inFIRE) (see Robot1.ppt, Robot2.ppt, Robot3.ppt, Princeton3macro.avi)

Maintenance of the Journals list remains a priority, with frequent e-mail communication with EBSCO required to help improve the quality and consistency of the list. New icons and notes have been added to distinguish titles received through the Massachusetts Board of Library Commissioners.

At the end of the fiscal year a project was begun to work through a list of common typographical errors in library catalogs. (http://faculty.quinnipiac.edu/libraries/tballard/typoscomplete.html)

Many more errors were found than were initially expected -- the most frequent offenders being very old records from UTLAS, e-book records from outside vendors, long table-of-contents notes added from electronic scans, and free-text summary or abstract notes. Some of the errors have been severe enough to make the records unfindable via normal searching, and many more would cause failure to retrieve using keyword searching. Cataloging staff was alerted to the problem.

Goals for FY 2008
  - Work to fully implement Millennium ERM.
• Continue to monitor journal uses and costs.
• Continue to maintain and improve the Journals list.
• Continue to work on finding typographical errors in Voyager as time allows.

USER SERVICES

User Services Overview for Fiscal Year 2007

• The gate count of people entering the library is down for the first time since 2004; however, it is still significantly higher than it was five years ago. At present, staff are unsure as to a reason for the decrease. It is possible that there are fewer on-premises users because people are taking greater advantage of the convenience offered by remote access to electronic resources. Increased marketing and instruction efforts may also account for fewer people physically entering the facility, since they either may be visiting online or they do not require as many follow up trips to the library.

• Overall circulation transactions were up last FY by almost 3000 transactions (41,857 in FY 06 to 44,751 in FY 07). Much of the increase can be attributed to the high demand for lap tops and Tech Suites. Book circulation has continued to decrease for at least the fifth consecutive year, but various measuring methods of electronic book access has demonstrated an increase in their overall usage. QA (Mathematics) continues to be the most heavily used print area.

• The number of instructional courses offered and attendance continues to rise. In FY 07, 275 sessions were offered (compared to 252 in FY 06) and there were 3375 attendees (up from 3075 the previous year). This number should continue to rise due to increased meetings with on-campus IQP groups, as well as the fact that some professors are requiring their students to participate in follow-up meetings with librarians. As was the case last year, half of all sessions were related to a specific course. The remaining 50% were comprised of general sessions and other librarian-user interactions, such as orientations, open houses, etc.

• The total number of interlibrary loan transactions continues to rise. This year 6099 transactions were completed, which is up from 4368 in FY 06. Two factors, which are (1) joining an additional reciprocal borrowing consortium and (2) listing the electronic journal holdings in OCLC (as referenced in last year’s report), can account for much of the increase. The electronic journal holdings in OCLC do not have holdings records attached, which has led to an increase in incomplete transactions. At present, there is no cost-effective alternative to decrease the incompletes, but the benefits far outweigh the drawbacks.

• The Interlibrary Loan Department implemented various customer-focused initiatives in FY 07. These enhancements, which range from streamlining technological processes to customer service improvements, have been very successful. As a result, the work-load has increased for the department – a development that will need to be closely monitored over the upcoming year.
Reference statistics are down this year from 4410 to 4053. It is interesting to note that questions from undergraduates, which is by far the largest group utilizing reference services, increased from 62% to 66% of the overall total. Furthermore, online reference transactions via email and IM Chat have decreased from 622 to 345 occurrences. Additional statistical analysis will need to be done to determine the negative trending; however, possible explanations for the decline are that increased instructional offerings and a greater/more visible web presence are answering user questions before they reach the information desk.

The integrated service desk arrangement has been working well. Staff, as well as student workers, are gaining a better overall understanding of how Reference and Access Services interrelates in the library. Since this new set-up has somewhat altered the workflow of the User Services area, follow-up training will be scheduled as needed to ensure continuous high quality customer service.

Overview of Major Activities, Projects, Achievements
Library Service Area Renovation
Most of the major main floor renovations were completed over the summer of 2006. User Services staff, who were previously stationed at various points around the main floor, were relocated to be in closer proximity to one another. Additional office spaces were created to enable one-on-one and group meetings among staff and with library users. Two Tech Suites were installed in the old office spaces that were vacated by the move.

In the summer of 2006 the reference collection was greatly reduced in size and relocated from the South side to the North side of the second floor. Tables, chairs, and tables with large computer screens were moved to fill the empty space once occupied by the old reference shelving. The tables with the computer screens have proven to be immensely popular, since students utilize the set up for their project based assignments. In addition to the new table layout, a “South Side Sanctuary” team was formed. This team (Laura Hanlan, Christine Drew, and Lora Brueck) focused on creating a user friendly atmosphere in the new space. Five occasional tables, each with power and data connections, were installed at various points and have been nicknamed “pods” by the staff. The team also designed a counter height station that holds two computers for online library catalog access. This location, referred to as a “Search Stop,” is positioned adjacent to the entrance where it enables patrons to quickly look up library holdings. To further enhance the user experience, more comfortable seating is planned in this area for the future.

The old reference and circulation desks were removed and replaced by a single integrated service desk over the winter break. This new set-up enables both Reference and Access Services staff to easily move back and forth between the main service points to assist each other when necessary. This blurring of “traditional” roles has created a more welcoming and approachable area for our users, and the associated cross-training has increased staff efficiency.
LibQual+

The LibQual+ Final Report, which was authored by Helen Shuster, Debbie Bockus, and Joanne Beller, was submitted to the Massachusetts Board of Library Commissioners on October 10, 2006. The survey was administered earlier in the year during the months of January and February 2006.

While the response to library services was overwhelmingly positive, there were a few areas where a few users expressed a desire for improvement. A recurring concern was the difficulty people had accessing and finding information via the library web site.

- **Service Concern:** Accessing resources from home or the office. **Action:** (a) Movie clips, brochures, and other advertising venues were created to better inform the user community about the Proxy server. (b) User Services staff are beginning to investigate EZ proxy, an alternative to the existing proxy server. **Outcome:** (a) Questions regarding off-campus access appears to have diminished. (b) EZ proxy, which enables patrons to access resources remotely via a barcode or other identifiable ID#, has drawbacks. An investigation on whether to stay with the current proxy or switch is ongoing.

- **Service Concern:** An easily navigable library website. **Action:** Focus groups were scheduled to determine the needs of faculty, staff, and students. **Outcome:** Focus groups that were scheduled in the spring of 2007 were cancelled due to lack of participation. Fall 2007 is now the new target timeframe for these sessions; however, these, too, may be delayed. WPI has recently contracted with an outside vendor to redesign the entire WPI web site and that may have a large impact on what can be implemented on the library site. This issue will be resolved early in the fall.

- **Service Concern:** Lack of needed electronic resources. **Action:** This topic will be addressed in focus groups or elsewhere. **Outcome:** As mentioned above, focus groups may be tabled.

- **Service Concern:** Modern equipment to access the library information. **Action:** Three new Tech Suites came online in summer 2006 and additional dual/large screen monitors were purchased. Twelve new laptops were added to the laptop loan program. **Outcome:** Tech Suite usage went from 3593 sign outs in FY 06 (when there were only 4 available) to 5515 in FY 07.

- **Service Concern:** Adequate print and electronic journals. **Action:** Focus groups would also address this issue. In addition, the newly established departmental liaison program (see more below) has enabled library staff to have an ongoing dialogue with academic and administrative departments. In addition, we have purchased multiple electronic journal packages, including Blackwell-Synergy (770 titles), Lecture Notes in Computer Science, and Sage. **Outcome:** Service in this area has definitely improved, but keeping current with desired content will need to be addressed on an ongoing basis.

In addition to the standardized questions above, library staff had the opportunity to gather responses to questions of particular importance to the Gordon Library.
• **Service:** Providing help when and where users need it. **Action:** Student supervisors were trained in basic reference. In addition, staff now wear name tags so patrons can easily identify who to ask for assistance. **Outcome:** It appears that staff and student workers are now being approached more often now that they are more visible.

• **Service:** Awareness of library resources and services. **Action:** Outreach activities have been increased on a variety of fronts. The liaison program has enabled librarian to interact more with faculty, and quarterly “Library Interventions” in the Campus Center allow greater student contact. An increase in printed publications has also raised the library’s profile. **Outcome:** The liaison program, which is both evolving and promising, has been moderately successful with increasing faculty interactions. The campus center visits by library staff have generally been well-attended. Overall, the library has been able to elevate its presence on campus.

• **Service:** Teaching users how to locate, evaluate, and use information. **Action:** Additional workshops, online tutorials, and print materials are being created as needed. **Outcome:** Due to the ever changing nature of services and resources offered at the Gordon Library, education efforts in this area will be an ongoing challenge and opportunity.

• **Service:** A more efficient interlibrary loan/document delivery process. **Action:** The ILL department has implemented lending strings and direct borrowing via OCLC to help streamline the borrowing process. In addition, the Gordon Library is now a member of LVIS, which gives patrons more options to borrow materials without a fee. **Outcome:** Average turn around time has been decreasing since the new services were implemented. In addition, there has been a greater cost savings for users due to the new sharing agreements.

• **Service:** More convenient service hours. **Action:** Library staff met with student organizations to hear their concerns about open hours. A survey was conducted via myWPI to identify which nights students would prefer staying open later, as well as their reasoning for wanting those additional hours. **Outcome:** A pilot was established during D term where the library stayed open an additional hour two evenings per week. Based on usage statistics the program will be moved from pilot to permanent status.

The entire final LibQual+ report can be accessed at: [http://www.wpi.edu/Academics/Library/About/Libqual/MBLCreport/WPI_libqual_MBLCreport.pdf](http://www.wpi.edu/Academics/Library/About/Libqual/MBLCreport/WPI_libqual_MBLCreport.pdf)

**Outreach and Marketing**

“Campus center interventions,” a new initiative where User Services staff spend a few hours one day in the campus center per term to showcase library events and services, has proven to be very successful. In FY 07, topics included:

• A Term: Pirate Day. Advertised the new A to Z journals list.
• B Term: RefWorks Rocks. Staff handed out rocks to promote RefWorks, which is a bibliographic citation management tool.
• C Term: ULUV the Library Open House. Advertised the Gordon Library Open House. Faculty, staff, and students submitted reasons why they love their library.

• D Term: National Library Week. User Services staff hosted a book signing where six WPI faculty were on hand to autograph copies of their latest publications. People were also encouraged to submit entries for the haiku poetry contest.

User Services staff were also involved in other outreach activities throughout the course of the year, such as Admissions open houses (on three occasions), two transfer student events, the IQP Fair, and the GRAD 2007 poster session display. Under the coordination of Christine Drew, the library also had a very large presence at several orientation events last fall.

The IT Liaison program, which is a joint outreach effort with the ATC, was launched in late summer 2006 as a way to increase interaction with faculty and other administrative departments on campus. Librarian responsibilities include: (a) providing updates on new products; (b) introducing users to new services; (c) relaying to fellow library staff relevant research interests that may impact library purchases; and (d) serving as a faculty/staff conduit for all library initiatives. The program has proven to be moderately successful, and it is going to be stressed even more in the future. To help ensure the success and continued support for the program, participation has been added to all exempt job descriptions for User Services staff.

Several new marketing vehicles were also added this year. The Promotion Team worked closely with the Marketing and Communications Department and JS Graphics to create a new library logo, which has been gradually appearing on library-related print and electronic publications. Screensavers that display new library services, products, and events now appear on all log-in computers. Finally, a marketing plan is being developed, as well as an informational template for the Tech News.

**WebFeat**

Due to the dissatisfaction library staff had with ENCompass, the existing multi-database search tool from Endeavor and because Endeavor was taken over by Ex Libris who did not plan to support ENCompass after 2008, vendors were contacted during the fall of 2006 and winter 2007 to determine a replacement. Several companies, including WebFeat, Serials Solutions, AutoGraphics, TDNet, and ProQuest CSA, all provided an on-site visit or a webinar to demonstrate their products.

In addition to the demonstrations, all vendors provided trial access to their products. Library staff ran comparative searches across all of the databases and had meetings to discuss the results. Student workers were also included in the process, since they would be the greatest users of the product and they had their own strong opinions of what made the multi-database search capabilities worthwhile. After months of testing and checking references at other colleges and universities, the library staff selected WebFeat.

Library staff are currently deciding which databases to include in WebFeat (up to 50 can be selected), and a sub-committee is focusing on how the new service will appear on the
library website. Once again, student input was solicited on the “look and feel” issues because of their familiarity with searching the Internet.

Staff have branded the product QuickFind, and an associated graphic has been developed. A “soft” rollout is slated for August, and a user survey is being constructed to gather feedback. Marketing discussions are underway to help decide the best way to publicize QuickFind once the students return in the fall.

**Notable Staff Activities**

Matt had the opportunity to present twice on Tech Suite Usage at WPI. In March, he spoke at the NERCOMP Annual Conference in Worcester with Amy Ricci, the Assistant Director of the Academic Technology Center. In April, he was a panel speaker at a NELINET conference in Boylston, MA that focused on the redesign of library space.

Christine presented on nine different occasions in FY 07. Topics included podcasting, information literacy, and faculty/library collaboration, among others. Her expertise in these areas has created interest not only in the local library community, but also on a regional and national level as well. She received an Outstanding Service Provider Award by the Management Department at WPI as well.

Debbie coordinated the first ever campus-wide Student Recognition ceremony. She was also very active on library committees, which included being Chair of ARC Professional Development Committee for six months and Chair of the PARA Review Board in the Massachusetts Library Association Paralibrarian Section. Debbie presented twice on the statewide Paralibrarian Recognition of Achievement Program. In addition, she co-authored the final LibQual+ report.

Lynne chaired the ARC Professional Development Committee for six months, and she served on the MLA Paralibrarian Section Program Committee Member and Career Development Subcommittee Member, as well as the Central MA Library Association Continuing Education Advisory Committee. Lynne also gave a presentation, “The ‘Me Generation’…Getting the Most out of Student Workers in the Digital Age,” at a NERCOMP conference.

Joanne co-authored the final LibQual+ report. In addition, she served as the lead contact person for the recently instituted 30 minute weekly training sessions.

Laura completed the COWC Management Series I. She was also appointed the lead liaison for the library in the IT Liaison Program, and she gave a presentation on the program at a NERCOMP conference in New York. Laura increased ILL efficiency by implementing automated lending strings and having the Gordon Library join the LVIS consortium. She is now the “point-person” in the library for the creation of brochures. In addition, she was recently elected Co-Vice Chair of NELIG. Laura was chosen to be one of the two IT Division trainers for campus wide Noel Levitz customer service training. Twenty trainers were chosen altogether from all Divisions. Laura will be trained to train staff as a member of a two person team. This training is mandatory for all staff.
Staffing Changes
The User Services staff underwent moderate staffing changes in FY 07. Laura Hanlan’s title was changed from to User Services Librarian to better reflect the diverse role she holds within the department. Ginny Julian, Circulation Assistant, had her hours increased temporarily from 25 to 35 per week half way through the year. Her hours were augmented to meet the demands of additional Access Services initiatives.

In addition to modifications in titles and hours for current staff, User Services said goodbye to one long time staff member and welcomed a new employee in January. Katherine Gurbanov, Evening/Weekend Library Supervisor, moved on to become the Head of Circulation and Technology at the Marlborough Public Library. While the departure of Katherine was sad, we were very fortunate to hire Jennifer MacMillan to fill the vacancy. Jennifer, who has experience in academic as well as public libraries, brings a wealth of knowledge and a strong customer service focus to the position.

Finally, Matt Hall joined the staff in October 2006 as the new Director of User Services/Assistant Library Director.

User Services Goals for Fiscal 08
- Continue implementing LibQual+ findings, including holding focus groups as necessary.
- Leverage great start to IT Liaison program to increase library-departmental communication; adjust services as needed based on participant feedback.
- Seamlessly integrate the ATC position (Academic Technology Outreach Specialist) into the workflow of User Services; maximize the skill set and duties of the person in pursuit of the “blended” librarian concept.
- Continue to develop best practices for a merged desk operation, including the sharing of information about student employee roles and responsibilities.
- Investigate current statistics to determine: (1) if the numbers are an accurate reflection of our work output, i.e. are we collecting the most relevant data; and (2) are there stats out there that we are not keeping that we should.
- Continue “Southside” renovation project by selecting new seating and table arrangements.
- Continue the weekly 30 minute training sessions with topics that are diverse and of interest to the entire department.
- Work with First Year and INSIGHT groups to help entering students have a successful transition between high school and college.
- Ensure that User Services priorities and goals are in line with overall library strategic planning efforts, which are based on Balanced Scorecard initiatives.
- Continue to create, utilize, and promote multimedia content, such as podcasting and video podcasting, to both on campus and distance learners.
- Continue to market Library and User Services initiatives to the entire campus.
REFERENCE

Overview

In the summer of 2006 the reference area was relocated to the opposite side of the main floor along with the entire User Services department. Staff offices, the reference desk service area, and the reference book collection were all moved to the north side of the building to bring together the physical locations of several inter-related departments, including Reference, Access Services, Instruction, and Interlibrary Loan. In addition, a staff conference room was created adjacent to the Reference Coordinator’s office for meetings and other staff activities.

The size of the physical reference collection was halved for the move. This was made possible by: (1) discarding some outdated materials; (2) changing some to “circulating” status with a shorter loan period and relocating them to the circulating shelves; (3) relocating less used reference materials to Founders storage, which can be recalled when needed by a patron; and (4) making a concerted effort to purchase electronic equivalents instead of the print.

New low reference shelving was ordered to replace the old orange metal full size shelving. This gave the space a more open visual appeal, and with the shift in reference philosophy the full size shelving was not needed. Since it was critical for the project to be finished by the start of A term, the organization, packing and moving of the Reference Collection was expedited. The coordination of the placement and setup of the new shelving was designated to Christine Drew and Joanne Beller. However, once the new reference shelving was in place, and through extensive effort of many staff and student workers shelving the reference collection back into the new shelving, it was discovered that the shelving ordered was not enough to hold even the reduced reference collection. Christine and Joanne had to make further shifts in the collection to make it fit the new shelving, which impacted the library in a number of ways. It doubled the original planned shift of reference materials into restricted use (shorter loan period) in the circulating collection, and extensive shifting had to be done to make room in the already tight areas of the existing circulating collection. It also doubled the cataloging and technical services workload to reclassify and relabel each book. The volumes that were moved to storage also had to be reclassified, relabeled, and more room made for the additional volumes.

The previous reference area was also completely redone. Two Tech Suites now occupy the space once held by the Assistant Library Director and Interlibrary Loan offices. Two stand-up computer stations, known as “Quick Stops,” were installed to help expedite the process for users who needed to find an item in the collection. Large screen monitors were installed on tables to facilitate group study. Finally, lounge seating and “pods” (quasi-occasional tables with network access built in) were placed in areas to encourage students to relax and unwind while in the library.

An integrated reference/circulation desk was installed in December 2006/January 2007. The new service model has proven to be quite effective as users are guided easily to
either the reference or circulation points, depending on their needs. The desk also served as an impetus for cross training access services and reference staff to better facilitate staff/user interactions. This cross-training will need to be ongoing, as issues arise periodically that need follow up or further clarification. In addition, there were two minor problems with the physical layout of the desk. A support beam was located in the “knee space” of the reference area, but the WPI carpenters have corrected this feature. The computer monitor was placed in a position that made it difficult for patrons to see the screen. An articulated arm is on order to remedy this problem.

Perhaps the most significant addition to the reference collection last year was the purchase of WebFeat, the multi-database search product. WebFeat, which the library staff branded QuickFind, allows users to search up to 50 databases at a single time. Staff are confident that the WPI community will find this tool useful.

Statistics
Reference statistics decreased from the previous year (4053 in fiscal 2007 vs. 4410 in fiscal 2006). Decline in these statistics might be accounted for by the library’s increased training program/sessions highlighting our expanded library services and electronic resources to the WPI community. Reference statistics appear below in Table 1. The statistics represent the interactions of reference staff, whether at the Reference Desk or at their own desks.

One area of substantial decrease was in electronic communication. The 2005-2006 reference statistics indicated an increase in patron use of electronic communication technologies such as email and IM chat to find the answers to their questions; however, the 2006/2007 email reference (Library-Questions/Personal Email) and our Trillian/Chatango IM chat service showed a decrease in usage compared to the previous fiscal year. The totals are as follows:

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<tbody>
<tr>
<td>Email Reference</td>
<td>451</td>
<td>341</td>
</tr>
<tr>
<td>IM Chat</td>
<td>171</td>
<td>144</td>
</tr>
</tbody>
</table>

The decrease in IM and email reference correspondence is indicative of the overall negative trending in reference interactions. The decline may be more pronounced in the electronic arena due to the fact that the library-questions email was changed to library-answers due to spamming concerns. An extra password step was installed and it is hoped that is not discouraging students from using the service. Reference staff will need to be diligent in monitoring this change. On the other hand, the large percentage drop in online reference may be indicative of the fact that students with questions are taking the time to come to the library. Staff have spent ample time making the library more inviting, so students entering the library may be utilizing their time more effectively.
Table 1

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<tr>
<td><strong>By Question-Type</strong></td>
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<tr>
<td>Dir - NRB - RB - StrB</td>
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<tr>
<td>S Stats</td>
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<tr>
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<td>D Term</td>
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<tr>
<td>E Term</td>
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<tr>
<td>Total</td>
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**Founders Storage**
In the past Reference staff had been responsible for the retrieval/return of patron requested library materials that have been placed in the library’s storage area in Founders Hall. Reference has created an Access database to analyze impact on staff (Reference and ILL), by what is being requested. Condition of materials for Interlibrary Loan requests is also captured. However, the realigning of User Services Division has placed this service more appropriately with the Interlibrary Loan and Access Services departments. Beginning with FY 08, these statistics will be reported by Access Services.

**Goals**
- Re-examine workflow and training to maximize the reference staff and service potential of the new integrated desk.
- Investigate next generation of statistical packages to keep our statistics accessible when current software packages are no longer supported.
- Re-examine reference statistics to see if they are being used to their fullest potential in reflecting our usage and services.
- Continue Reference Desk Manual revision and updating.
- Continue to re-evaluate current reference holdings, print versus electronic
• Continue weekly ½ - 1 hr. training session open to all library staff and library student staff which will introduce staff to new/existing products and services available in the library.
• Continue to watch/monitor WPI implementation and anticipate potential reference applications.
• Continue/expand Reference participation in IQP/MQP library instruction.
• Reference coordinator will continue to participate in the assessment of LibQual (Spring/2006) survey results and implement potential changes to the reference area.

**INSTRUCTION**

**Completed Goals 2006-2007**

- Continued to develop & promote information literacy program goals through outreach, developing partnerships and working towards developing assessment methods
  - The new First Year program has adopted information literacy as one of their outcomes for the new Great Problems Seminars (GPS), in addition Christine Drew attended an AA&CU Global Learning Institute with the FY faculty to help structure the program
  - Worked with eleven additional (some newly appointed) faculty to help include information literacy into their courses
  - Christine published a paper in ASEE 2007 conference proceedings on our outreach and collaboration with the Center for Entrepreneurship & Innovation & participated in a panel discussion with MIT and Penn State librarians. In addition she worked with Corporate and Professional Education staff to provide more user documentation as well as adding questions to their survey of students on library services.
  - Worked with Center for Career Development to provide company research information and a joint workshop.
  - Began developing a more comprehensive plan to assess students learning of IL, perhaps even within the new First Year program(s).
- Christine served as an active member of the CAP General Education Committee to promote information literacy skills to first year programs
  - The CAP General Education Committee proposed implementation ideas & outcomes for the First Year to the faculty, who approved the plan. The first outcome includes *information literacy*.
- Worked on instructional video clips for Research Circuit (formerly SearchPath) modules & web site, myWPI instruction modules, & maintained Help & Instruction web content to meet user needs, including distance learners.
  - In Summer 2006 we revised the entire Research Circuit online tutorial to include more visual content & the quizzes in myWPI
A new section of web site on How To ... Instructional Videos, was created. This included videos on how to set up the Proxy Server (Internet Explorer & Firefox), Company Research and others.

- Collaborated with ATC, CCC on Help & Instruction offerings/content for the IT division
  - Worked with ATC on new faculty technology awareness and with ATC to help roll out liaison program Summer 2006.
  - Met with ATC, Academic IT Support, and CCC to coordinate training activities, posting & schedules of sessions.
  - Regular communications with ATC staff to offer training aligned with IT division offerings were successful.
  - Worked with ATC to improve PDF user documentation for eProjects implementation as well as user documentation/video tutorials for the eProjects submission process which will be mandatory starting 2007-2008 academic year.

- Collaborated with ATC, Academic IT Support, and CCC to coordinate training activities, posting & schedules of sessions.

- Regular communications with ATC staff to offer training aligned with IT division offerings were successful.

- Worked with ATC to improve PDF user documentation for eProjects implementation as well as user documentation/video tutorials for the eProjects submission process which will be mandatory starting 2007-2008 academic year.

- Participated in LibQual+ assessment and related follow up activities
  - Implemented proxy server How-to movie clips, assisted in establishing web conferencing kits for Tech Suites, continued work on outreach, educational and promotional activities, including creation of screensaver advertisements for library services/resources.

- Collaborated with additional faculty on course-related library instruction and building information literacy integration into course instruction, including continued inclusion into ID2050, targeting on campus IQP project teams/advisors, and disciplinary focus
  - Worked with a marketing professor to co-advice IQP project on WPI Podcasting, and worked with a number of new faculty to infuse IL into their courses.
  - For ID2050 & on campus projects, librarians consulted with 103 teams and we increased number of meetings with on campus IQP teams, many through the new PQP pilot course offered A Term.

- Explored uses of creative and innovative instruction technology
  - Continued use of podcasting, experimentation with video podcasts.
  - Trial of classroom software, including Synchroneyes.
  - Experimentation with RSS feeds within myWPI course sites and use of social bookmarking, offered courses on del.icio.us and tagging, editing the wiki.

Additional activities, projects, achievements

myWPI integration

For the past few years’ six librarians working with ID2050 courses have been including content (contact information, links to an online research tutorial, and assessments) for students to access library assignments. In addition, we have been using the myWPI survey tool to gather feedback from the ID2050 students on their research experience with the online tutorial and interaction with the librarians. Overall, the IQP research consultations with librarians are highly valued by the students and we hope to continue to
work with faculty to integrate library assignments for these students within myWPI. One of our goals to regain inclusion in all ID2050 myWPI course sites as they are created. In past year we had achieved this when Sue Vernon-Gerstenfeld was coordinating ID2050 sections but with transition in IGSD staff, we now have to request permission to be added to courses on a per-course basis.

Within the past year a checkbox has been added to ATC’s myWPI course Activation Request

myWPI Email response to request for librarian contact

As you know librarians can help you connect your students to library resources and services within your XXX course. We can help you to incorporate access to library resources within myWPI course sites. Integration possibilities include:

- library skill-building assignments,
- library skill quizzes,
- library content integration via linking electronic readings (to e-books, e-journals, e-articles, e-etc.) & references to print sources too
- we even can create online tutorials related to history research (created with camtasia, see our How-to.. Instructional Videos web page at http://www.wpi.edu/Academics/Library/Help/Self/Movies/) or other databases, and links to appropriate print and online resources for your students such as: Encyclopedia of American social history.

Also, you can request that a librarian work with your students during an in-class research workshop (see http://www.wpi.edu/Academics/Library/Faculty/instruction.html for more information). Also, consider sending your students who are working on research projects to our online research consultation form at http://www.wpi.edu/Academics/Library/Help/rescon.html to schedule a meeting with a reference librarian for research help.

We can integrate any useful research tools or web site links for you if you allow one of us course builder or teaching assistant status in your myWPI course site. Let us know if you’d like to follow up any options.

Christine
x6163
This in turn has led to some myWPI integration opportunities which are not tracked in our statistics, but can take much staff time. See sidebar for the email template sent to faculty who request that a librarian contact them. Since implemented in March 2007, we have gained inclusion in 3 additional myWPI course sites to add information resources (Professors Spanagel and Dempsey). It is expected that this type of interaction will continue to gain popularity and the course site is an ideal place to incorporate library related content, databases, and information about services such as interlibrary loan.

Another trend we see is a move towards inclusion of online research/information literacy tutorials in myWPI course sites. Faculty we have worked with in past years are requesting that online tutorials replace face to face instruction. BUS516 is one example of this type of interaction. Online tutorials can take more than twice as long to create than offering face to face sessions, but students can access the online tutorials 24/7, and for this course in particular, some students are distance learners.

**Podcasting**

Podcasts: Summer 2006 we rolled out an audio version of *Two Towers: The Story of Worcester Tech 1865-1965*. Over the past year we created 21 segments of our podcast series *Gordon Library Audio to Go*. In addition, we worked with ATC to create a video of former staff and current students for an oral history of the Gordon Library for the 40th celebration.

**Library Web Site Improvements**

New self help web guides created include:

- How-to instructional videos
  
  [http://www.wpi.edu/Academics/Library/Help/Self/Movies](http://www.wpi.edu/Academics/Library/Help/Self/Movies)

In addition the web site databases & electronic resources were enhanced with logos allowing users more visual cues when selecting databases. New Databases by Subject/Type pages include:

- Citation Management
- Conferences, Meetings, Proceedings, & Symposia
- Geology & Earth Science

*Browse Journals @ WPI* sections were added to all databases by subject pages to help users connect with the library’s journal search. The web site Urchin usage data was analyzed and improvements made to the web site based on some of this data.

**Instruction Summary Statistics**

Librarians offered 275 sessions to 3375 people. Most of the sessions were offered to undergraduates, via orientations, course integrated, and general research sessions. Thirty seven percent of our offerings were for IQP teams performing research for their projects,
with some increase in meetings with on campus teams that do not take ID2050. Last year we had ten offerings for graduate students, this year we’ve had eight ranging from involvement in Graduate Research Achievement Day 2007 to four course integrated sessions. Both the number of attendees and number of sessions increased from the previous years, most likely due more awareness of instruction options by faculty at WPI (see Fig. 2).

We continue working on targeting programs that fit into the vision for Information Literacy at WPI. Forty-one sessions were either new general session topics, with new faculty that we had not worked with before via new instances of course-integrated sessions. Our busiest time with instruction is A Term, but much of this is related to orientation activities for various groups. C Term follows, due to the number if IQP groups we work with followed by B Term.

Our work with project teams has driven the increase in demand for instruction. Of 140 course related sessions, 101 were with IQP groups, compared to 83 meetings with IQP groups last year. This is due in part to a few ID2050 faculty members requesting their project teams meet with librarians two times. In addition, more on campus IQP groups are being required to meet with a librarian for instruction.

New citation management tools (RefWorks, EndnoteWeb) resulted in an increase in general sessions offered with 15 on these two products. Overall, general sessions increased from 38 last year to 48 this year. Demand for RefWorks workshops is driven in part by WPI’s project based education; however their online tutorial and webinars may have to be relied on more heavily in the upcoming year as staffing may not allow us to continue to support general workshops with the increased demand for course integrated offerings. See Appendix A for Citation Managers Usage data.
<table>
<thead>
<tr>
<th>Term</th>
<th>Sessions</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General</td>
<td>Course-Related</td>
</tr>
<tr>
<td>Summer '06</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>A Term '06</td>
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<tr>
<td>B Term '06</td>
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<td>28</td>
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<tr>
<td>C Term '07</td>
<td>7</td>
<td>51</td>
</tr>
<tr>
<td>D Term '07</td>
<td>8</td>
<td>15</td>
</tr>
<tr>
<td>E Term '07</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>TOTAL</td>
<td>48</td>
<td>140</td>
</tr>
</tbody>
</table>

| Total IQP groups | 101 |
| TOTAL Sessions   | 274 |
| TOTAL Participants| 3375 |

Total New Topics or with new faculty | 41 |

Sessions Offered by Type

- Course Related: 140 (51%)
- IQP Groups (included in above): 101 (37%)
- General Sessions: 48 (18%)
- Other (orientations, tours, etc): 86 (31%)

Goals for 07/08

Continue to:
- develop & promote information literacy program goals through outreach, developing partnerships and developing assessment methods
- work with Associate Dean of the First Year & faculty involved in Great Problems Seminars, the Peer Learning Community, and Insight to promote inclusion of information literacy skills
- work on instructional video clips for Research Circuit modules & web site, myWPI instruction modules, & maintain *Help & Instruction* web content to meet user needs, including distance learners
- collaborate with ATC, CCC on Help & Instruction offerings/content for the IT division, including the new *Academic Technology Outreach Specialist*
- collaborate with additional faculty on course-related library instruction and build integration, including continued inclusion into ID2050 as well as targeting on campus IQP project teams/advisors
continue to exploit uses of myWPI/blackboard course site for IL integration opportunities
explore uses of creative and innovative instruction technology such as video podcasts
outreach to campus community in interesting, inventive ways (campus center interventions, Scare Fest, etc.)
work with IT liaisons to increase faculty information literacy

Appendix A: Citation Managers Usage

EndNote Web usage - Custom Summary Report from ISI

December 2006- June 2007

<table>
<thead>
<tr>
<th>Date</th>
<th>Logins</th>
<th>New Users</th>
<th>New References</th>
<th>Exports</th>
<th>Imports</th>
<th>Searches</th>
<th>Captures</th>
<th>CWYW Format Bibliography</th>
<th>CWYW Traveling Library</th>
<th>Total Pages Served</th>
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<tr>
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<td>0</td>
<td>2</td>
<td>11</td>
<td>5</td>
<td>83</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>108</td>
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<tr>
<td>May 2007</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>8</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>17</td>
</tr>
<tr>
<td>Apr 2007</td>
<td>14</td>
<td>1</td>
<td>23</td>
<td>1</td>
<td>15</td>
<td>72</td>
<td>1</td>
<td>53</td>
<td>0</td>
<td>180</td>
</tr>
<tr>
<td>Mar 2007</td>
<td>5</td>
<td>0</td>
<td>68</td>
<td>1</td>
<td>15</td>
<td>13</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>102</td>
</tr>
<tr>
<td>Feb 2007</td>
<td>4</td>
<td>7</td>
<td>2</td>
<td>1</td>
<td>9</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Jan 2007</td>
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<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>6</td>
<td>0</td>
<td>2</td>
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<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total Use:</strong></td>
<td>25</td>
<td>13</td>
<td>114</td>
<td>11</td>
<td>130</td>
<td>103</td>
<td>1</td>
<td>55</td>
<td>0</td>
<td>452</td>
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<tr>
<td><strong>Average Use:</strong></td>
<td>4</td>
<td>2</td>
<td>16</td>
<td>2</td>
<td>19</td>
<td>15</td>
<td>0</td>
<td>8</td>
<td>0</td>
<td>65</td>
</tr>
</tbody>
</table>
RefWorks Usage

214 Users have accessed RefWorks in the past six months but more than 425 have created accounts and used RefWorks at WPI since August 2006. Many IQP and MQP teams use a WPI alias to create a shared RefWorks account, so 425 accounts does not reflect the number of actual users.

Worcester Polytechnic Institute Usage Summary Report
RefWorks
Report created: Tue Jul 31
12 month Usage Info.
Total Users = 425
Total Refs = 9924

Statistics by Month

<table>
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<tr>
<th>Statistics by Month</th>
<th>Jul-07</th>
<th>Jun-07</th>
<th>May-07</th>
<th>Apr-07</th>
<th>Mar-07</th>
<th>Feb-07</th>
<th>Jan-07</th>
<th>Dec-06</th>
<th>Nov-06</th>
<th>Oct-06</th>
<th>Sep-06</th>
<th>Aug-06</th>
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<tbody>
<tr>
<td>New Users</td>
<td>4</td>
<td>6</td>
<td>5</td>
<td>30</td>
<td>27</td>
<td>32</td>
<td>75</td>
<td>16</td>
<td>70</td>
<td>26</td>
<td>67</td>
<td>35</td>
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<tr>
<td>Repeat Users</td>
<td>17</td>
<td>21</td>
<td>32</td>
<td>52</td>
<td>45</td>
<td>82</td>
<td>36</td>
<td>43</td>
<td>36</td>
<td>37</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>Total Monthly Users</td>
<td>21</td>
<td>27</td>
<td>37</td>
<td>82</td>
<td>72</td>
<td>114</td>
<td>111</td>
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<td>Total Sessions per month</td>
<td>50</td>
<td>173</td>
<td>132</td>
<td>371</td>
<td>297</td>
<td>898</td>
<td>722</td>
<td>286</td>
<td>696</td>
<td>337</td>
<td>383</td>
<td>146</td>
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<tr>
<td>Average Sessions Per User</td>
<td>2.38</td>
<td>6.41</td>
<td>3.57</td>
<td>4.52</td>
<td>4.13</td>
<td>7.88</td>
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<td>4.85</td>
<td>6.57</td>
<td>5.35</td>
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<tr>
<td>Total Subscriber References added</td>
<td>542</td>
<td>971</td>
<td>322</td>
<td>1050</td>
<td>1033</td>
<td>2330</td>
<td>1875</td>
<td>775</td>
<td>1950</td>
<td>1100</td>
<td>597</td>
<td>613</td>
</tr>
<tr>
<td>Average References added per user</td>
<td>25.81</td>
<td>35.96</td>
<td>8.7</td>
<td>12.8</td>
<td>14.35</td>
<td>20.44</td>
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<td>18.4</td>
<td>17.46</td>
<td>7.28</td>
<td>13.04</td>
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</table>

ACCESS SERVICES

Overview
For the first time in 5 years, the number of patrons that have entered the building has decreased. Down by 8,492 from last year, we are still at a significantly higher level than we were in 2003. Interestingly, the number of items that circulated has increased by 4,059 over last year and is at the highest count in the past 5 years. Elimination and removal of the Microsoft Office CDs that we have offered for the past few years due to online availability has reduced circulation transactions significantly, but the additional laptops and Tech Suites have increased transactions. Other areas that have seen increases are DVDs and reserve items. This is the first time in five years that reserves usage has increased. However, the total number of books has decreased over the past five years. In FY 2003, the total number of books that circulated was 20,867. This year the total is 14,782. Therefore, in 5 years, book circulations have decreased by 6,085. “Book” items refer to those that are in the general collection but do not include items with a status of “New York Times Bestsellers”, “Tech Reports”, “Theses”, “Scores”, or “7 Day Circ”

In the spring of 2006, the University System of Georgia Libraries allowed Endeavor sites free downloading of their web based product, the Voyager Reporting System (VRS). This program creates Acquisitions, Cataloging and Circulation Reports from the Voyager
Access Tables. In reviewing these reports, it was discovered that the *Circulation Statistics Report* (Pircjob –j23) that we have been relying on for many years has a significant flaw. It does not count online renewals, only those done via the Circulation module at the Circulation Desk. The difference between these two reports is huge. *Circulation Statistics Report* produces a number of 4,123 renewals. The *VRS* report produces a number of 9,113 renewals. Additionally, there is a discrepancy in the number of reserves from the *Circulation Transactions by Patron Group & Item Type* (Endeavor prepackaged report), the *Voyager Reporting System* and our monthly manual count. The most likely cause of this is a disclaimer listed at the bottom of page 3 of the *Circulation Statistics – FY 2006-2007 Report* from the VRS. (included in this report)

Our largest group of users, WPI undergraduates, account for 69.3% of circulation transactions, up from 64.6% last year. They have been steadily increasing over the past 4 years while WPI graduate student usage has been dropping from 26.25% in 2003 to only 12.6% this year. The next largest group of users are WPI faculty at 6.6%.

The top 3 Library of Congress classifications this year were: QA (top for past 4 years), QC (3 out of 4 times it has been 2nd), PN (the only other appearance for this classification was in 2004 when it was 8th overall).

Forty-nine students were hired for the academic year, 3 less than last year. We hired 7 during the summer of 2006 (5 less than the previous year) and 9 during the summer of 2007 (1 less than the previous year). A surplus of $3,218.86 in the student budget can be attributed to several factors: fewer students hired, elimination of some circulation shifts, and additional federal work study money awarded students during the year. Even with the additional hours added during the end of D term for Sunday and Thursday nights, we are under budget. This may change for the upcoming year as all federally funded student workers will be required to use 15 of their hours in community service work. If we hire 35 federally funded students this year, that could mean a reduction in available federal funds of approximately $4,000 which we would have to transfer to library funding. Additionally, we will be offering the additional hours for Sunday and Thursday for the entire academic year, not just one term. Student assistants earned a total of $111,083.33 (federal funds of $41,718.44 plus library funds of $69,364.89).

Patron registration numbers are still not accurate. The Voyager system has not had a working patron purge option to remove inactive accounts. In the past, we have only been able to delete outdated records manually for small patron groups such as ARC patrons. The larger numbers of WPI undergraduate and graduate records are too difficult to monitor manually. There is a new program available now that we hope to implement this year to remove the old patron records so that we can get an accurate count of active patron records.

Access Services staff were quite successful accomplishing last year’s goals. The following is a quick synopsis of these accomplishments:

**Circulation**
- Evaluate policies, procedures & services based on results of LibQual+ survey.
Several requests were made on the survey for additional hours. As a result, the library is now open two nights, Sunday and Thursday, until 1 am.

Comments were also made about the need for additional laptops & Tech Suites. The library was able to offer 8 additional laptops supplied by the ATC. Even with these additional laptops, there are occasions when more are needed. Three new Tech Suites were added. Both of these have helped alleviate unfilled requests.

Noisiness in the library was a frequent comment. Areas were rearranged and signage added to try to alleviate some of the noise by providing areas designated as “Quiet Study Areas”.

Students requested that food and drink be allowed in the building. A pilot service now allows both beverages and snacks to be purchased from vending machines located on the 2nd floor.

A 5 minute grace period was added to laptop and Tech Suites to help students who returned items late.

There were a few comments that student workers were not very helpful in the evenings. Circulation Student Supervisors were given some basic reference training and all circulation student assistants were given additional customer service training.

- Evaluate & adapt workflow for new service area.
  - The merging of the Circulation and Reference Desks into the Information Desk has resulted in increased awareness of services offered by Reference, Interlibrary Loan, Circulation and Stacks departments to all staff members. Access Services staff have participated in and presented 30 minute User Services training sessions to improve understanding of each area’s expertise.

- Participate in training of ADA PC software for understanding of capabilities of equipment.
  - Meetings were held with Disabilities Services and the ATC to relocate the Kurzweil (ADA) PC to a more prominent location and training was planned for the software. However, due to scheduling conflicts training was never completed. There was only one request by a student to use this machine. The student decided to purchase his own software and did not need to use the library’s. Since the usage is non-existent at this time and training may not be used immediately, we decided to wait until notified by the Disabilities Services staff that there is a need for the machine and then intense training would be set up for library staff. (This machine is not available to the general public as a WPI login is required.)

- Additional accomplishments
  - Expanded safety training for all library student supervisors.
  - Enhanced communications and awareness with library patrons on campus crime. Due to recent thefts in the library, printed crime alerts with tips on how to avoid being a victim were distributed throughout the library. Meetings were held with Campus Police to identify new security measures that could be implemented.
o Implemented new electronic inventory through collaboration with Collections and Systems librarians.

o Responded to patron requests to offer headphones with microphones and laptop network cables by offering these as items that can be requested and charged at the Information Desk.

**Interlibrary Loan (complete report filed separately)**

- Pursue further Interlibrary Loan reciprocal agreements in order to reduce costs and be more efficient.
  o Joined the OCLC LVIS consortium, which has allowed WPI patrons to obtain many more items for free than was previously possible.
  o Took advantage of Boston Public Library’s document delivery service and obtained over 60 articles for free that in the past would have cost WPI patrons between $10 and $15 each.

- Create a paperless office in Interlibrary Loan.
  o The vast majority of articles that arrive in the ILL Office are forwarded to patrons via email.
  o The ILL Office has made great stride toward becoming a paperless office. The only paper records that are now kept are 5 days of lending requests, renewal requests, UPS receipts, and paper forms for a variety of special borrowing requests.

- Implement patron initiated Interlibrary Loan requests through OCLC.
  o Through the implementation of OCLC WPI specific lending strings ILL Staff was able to implement unmediated book borrowing requests through OCLC FirstSearch databases, particularly WorldCat.

- Create excellent lending strings to streamline the ILL borrowing process.
  o Lending strings were created and have automated much of the process of borrowing standard items through ILL. The strings are constantly being updated to make them as useful as possible.

- Work with academic departments to develop easy ways to access department funds in order to pay for the small number of Interlibrary Loan items that require a fee.
  o Through the work of Helen Shuster and the support of Provost Simpson, Humanities and Arts created an ILL account to pay for “for fee” requests placed by faculty in the department.

- Visit local libraries to review Interlibrary Loan procedures and develop best practices for WPI Interlibrary Loan.
  o Visited Larry Spongberg at Assumption College to learn about lending strings and other ways to make ILL more efficient.
  o Spoke with ILL Staff at Holy Cross and UMass Medical School Library to discuss processes and procedures.

- Develop a smooth workflow for all involved in the Interlibrary Loan processes, including both staff and student employees.
  o Created extensive instructions and templates for the use of all who work in the ILL Office.
  o Provided training for staff on all procedures, policies, and templates.
INTERLIBRARY LOAN

Summary
The Interlibrary Loan staff has worked throughout this fiscal year towards the goal of making ILL borrowing more efficient, quicker, and less expensive for our users. Various initiatives were put in place throughout the year and the statistics in this report will show that our efforts have been successful.

There has been an increase in both borrowing and lending activity this year due to a variety of factors in the department, in the library, and in the broader library community.

Transaction Totals
This year saw an increase in both borrowing and lending activity. This was due to two significant initiatives:

- WPI joined the LVIS OCLC consortium to take advantage of reciprocal borrowing with public, special, and academic libraries from all around the country. This increased the number of our reciprocal libraries by over 2000. It also allowed us to borrow many more items for free than we have been able to in the past but also brought an increase in lending requests and increased mailing costs.
- WPI’s holding symbol is now attached to our electronic journal titles in OCLC. Our holding symbol was added this fiscal year through an OCLC pilot project. Specific holdings are not indicated, though, which has caused an increase in requests for articles from years to which we do not have access.

The graph below shows the total borrowing and lending transactions handled by the ILL staff*. Note that these numbers include requests that were completed as well as those that were not completed or unfilled. It is important to note that requests that cannot be filled can take equal time to process as those that can be filled.
* The total is calculated by adding ILL Management data for all lending transactions (complete and not completed), ILL Management data for completed borrowing transactions, data for not completed borrowing requests (calculated outside ILL Management), and Boston Public Library requests processed. The non-completed borrowing request data from ILL Management is not used since many transactions which are not completed do not get uploaded into the database before they are cancelled. The graph below shows trends in completed requests in the department.
Increased Efficiency and Improved Customer Service

This fiscal year the ILL department made great strides towards making borrowing more efficient and customer focused. The following is a list of initiatives implemented this year:

- Instituted custom lending strings through OCLC which dramatically reduced the workload for standard borrowing requests. Much of the process has been automated so that requests initiated by WPI patrons will get to potential lenders more quickly than they had in the past.
- Created lending strings that allowed the department to implement patron initiated requesting for books through WorldCat. When a patron initiates a request, in most cases that request goes immediately to a potential lender rather than having to be viewed by one of our staff.
- Began sending email request confirmations for all for requests initiated through Voyager and the Full-text finder.
- Made desktop delivery of articles, which was introduced as an option in FY06, the default for article delivery in FY07.
- Email pick up reminders are now manually sent to all patrons who have not picked up items within a week of their arrival at the library.
- Implemented an online renewal form created by Christine Drew, to enable more self service.
Fee Analysis
A major challenge over the past two fiscal years has been to work towards reducing fees to WPI patrons. These are the initiatives implemented during FY07:

- Joined the OCLC LVIS consortium which has allowed us to obtain many more items for free than we could have obtained in the past.
- Took advantage of Boston Public Library’s document delivery service and obtained over 60 articles for free that in the past would have cost WPI patrons between $10 and $15 each.
- Through the work of Helen Shuster and the support of Provost Simpson, Humanities and Arts created an ILL account to pay for “for fee” requests placed by faculty in the department.

IFM charges which are automated through the OCLC ILL system have significantly decreased this year due to WPI joining the LVIS consortium.

The IFM charges for this year were $617.55. From that total, $526.85 was reimbursed through Faculty Accounts ($193 from the HUA ILL Fund). This leaves $90.70 which was paid for by individual patrons.
Incomplete Request Analysis
The following chart shows the number of requests not completed this year. These incomplete requests represent a significant amount of work to the department staff.

![Incomplete Requests 2-Year Trend](image)

Of the 9293 requests that the ILL department processed this year, the above graph shows that 3130, or about 1/3 of our transactions were for items that we could not obtain for our patrons or could not provide to other libraries.

For lending, the large increase in incomplete requests can be explained by WPI’s participation in an OCLC pilot project. Through this project WPI’s holdings symbol for all journals listed in WPI’s journals list are now indicated in WorldCat. For ILL this has caused increased requests for years of items that we do not have because our specific holdings are not included with our symbol. Many incomplete lending requests were for:
- Items for which we lack the requested year,
- Items that we list in our journals list that we can not lend due to copyright
- Items that we list in our journals list that are actually free web resources (added to our journals list for the ease of searching to WPI patrons.)

Despite the increase in incomplete requests, the OCLC pilot project has benefited the department and the library community in general because WPI is now able to lend many more journal articles than had been possible prior to inclusion in the project.

The following graph shows that over the past two years the number of incomplete borrowing requests has decreased by about 30%. The most notable change is in the “Patron refused fee” category. In FY06 over 200 requests were not completed for our patrons due to their unwillingness to pay fees that would be charged by the lending library. Due to WPI joining the LVIS consortium and taking advantage of the Boston Public Library document delivery service, the department has increased its ability to
obtain more materials for free. In FY07 only 29 requests were not completed due to patrons being unable to pay fees.

It is also notable that fewer patrons requested items owned or subscribed to by our library, which is a positive trend.

<table>
<thead>
<tr>
<th>Reason for Incomplete Borrowing Requests</th>
<th>FY06</th>
<th>FY07</th>
</tr>
</thead>
<tbody>
<tr>
<td>We own</td>
<td>324</td>
<td>250</td>
</tr>
<tr>
<td>Patron refused fee</td>
<td>217</td>
<td>29</td>
</tr>
<tr>
<td>No availability</td>
<td>98</td>
<td>178</td>
</tr>
<tr>
<td>Free on Web</td>
<td>61</td>
<td>39</td>
</tr>
<tr>
<td>Non-Circulating</td>
<td>27</td>
<td>15</td>
</tr>
<tr>
<td>WPI purchased</td>
<td>18</td>
<td>13</td>
</tr>
<tr>
<td>Item too new</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Other</td>
<td>125</td>
<td>54</td>
</tr>
<tr>
<td>TOTAL</td>
<td>879</td>
<td>589</td>
</tr>
</tbody>
</table>

**Staffing and Reporting Changes**

Laura Hanlan’s title was changed to User Services Librarian reflecting the fact that her workload has expanded beyond the bounds of Interlibrary Loan to include more Reference, Instruction, and Liaison work. The Interlibrary Loan Department now reports to the Director of User Services rather than both the User Services and Access Services Departments.

A second work study student was added to the department this year in order to assist with the increase in transactions.

**FY08 ILL Department Goals**
During the coming year the department plans to continue efforts to make ILL service more customer-focused and less expensive to WPI patrons.

Additional goals are:

- Implement the importing of scanned documents into Ariel in order to reduce extra duplication of articles before they can be shipped to other libraries.
- Investigate the viability of using free Odyssey software to increase electronic delivery from Illiad/Odyssey libraries.
- Investigate options for eliminating all fees for standard requests for patrons who cannot pay using a department accounts (e.g. undergraduates). This includes completing a benchmark study of peer institutions.
- Streamline statistics collection within the department.
- Investigate Loansome Doc and other options for borrowing through medical library consortia.
- Rearrange ILL Office to create more space.
- Examine ADLN procedures and marketing. Update ADLN webpage and devise plan to better advertise the service. Investigate Relais, CISTI unmediated requesting, and Rapid, to determine viability for WPI.
GENERAL LIBRARY GOALS 2007/2008

Library staff are looking forward to building on the successes of this past year to ensure ongoing progress for our many goals and objectives. Some of the broader goals we hope to accomplish next year are as follows:

- Communicate with the VP for Advancement and identify planning strategy for library renovation funding in the new capital campaign so as to implement the library vision.
- Communicate with the Administration to stress the importance of adding staff to the library in the face of increased workloads.
- Manage the budget to support the curriculum and research needs of faculty and students.
- Maintain and expand the electronic and print collections to meet the needs of faculty and students.
- Work toward developing systemic library information competency across the curriculum: First Year Experience, IGSD integration, tutorials and other library integration within myWPI, and discipline-specific course instruction at the undergraduate and graduate levels.
- Build stronger library relationships with academic departments focused on marketing appropriate services, integrating with coursework and research activities and understanding collection needs. Develop liaison program to further this goal.
- Foster discovery of library resources and services through library web site and catalog improvements; review Ex Libris Digitool as digital repository.
- Meet with representatives of SGA and GSO to assure attention to their needs and implement solutions wherever possible.
- Assess library services, including continuing follow up on LibQual+ and the establishment of outcomes and measures for continuous evaluation in keeping with accreditation and other campus-wide objectives.
- Continue to review and create library policies and services that reflect understanding of changing student and faculty needs. Use available system technologies to their fullest extent to help achieve this goal.
- Ensure learning opportunities for all library staff to retain our talented, motivated, and highly effective staff.
- Continue to identify and pursue grant funding for special projects.