# UNIVERSITY OF MANITOBA LIBRARIES

## 2003-2004 ANNUAL REPORT

**TABLE OF CONTENTS**

1. **INTRODUCTION** ............................................................................................................. 2

2. **COLLECTIONS** ................................................................................................................. 4

3. **INFORMATION SERVICES AND SYSTEMS** ................................................................ 14

4. **LIBRARY DEVELOPMENT** ........................................................................................... 19

5. **OUTREACH** ...................................................................................................................... 21

6. **STATISTICAL SUMMARY AND COMMENTARY** ............................................................ 23

7. **OPERATIONS AND PLANNING** .................................................................................. 24

8. **FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT (FIPPA) AND PERSONAL HEALTH INFORMATION ACT (PHIA)** ................................................. 27

9. **CONCLUSION** ................................................................................................................. 28

**APPENDIX 1** – Libraries response to LibQUAL+ Survey Results 29

**APPENDIX 2** – Libraries Planning Retreat 2003 30

**APPENDIX 3** – Circulation and Public Service Statistics 45

**APPENDIX 4** – New Resources added to NETDOC during 2003/2004 47

**APPENDIX 5** – Libraries Customer Service Needs Assessment Analysis 48
1. INTRODUCTION

The University of Manitoba Libraries continues to move forward in fulfilling its vision of being recognized “as an essential resource for information within the University and the Province of Manitoba, providing an environment which fosters scholarship, creativity and learning.” During fiscal year 2003-2004, advancement on several fronts has been achieved through the commitment, resourcefulness and efforts of Libraries staff.

The Libraries made improving service and access to its resources a priority during the year. Many initiatives are highlighted in this year's annual report. The major ones include:

- The on time seamless implementation of a new library information system for BISON which provides increased functionality for our users. As well, the College St. Boniface joined us and their library’s holding are included in BISON.

- “Chat Help”, a new reference service was introduced to provide users with a new way to connect in real time with reference librarians – through our web site. Users are able to “chat” live online with library staff from one of the University of Manitoba libraries by clicking on the “Chat Help” link located on the UM Libraries’ home page. Library staff can lead conversation, and generally help with the research process. At the end of the session, a transcript of the conversation, which includes all URLs is emailed to the user.

- The introduction of “UM Links”, a service that enables users to move directly from a citation in a database to the full text of the corresponding article. In the month of March it was used 125,000 times.

- Hours of opening and access to technical assistance were increased with funds provided by the Vice-President (Academic) & Provost.

- The demands of our new BISON online catalogue system and our new electronic resources necessitated the most ambitious computer and renewal plan ever undertaken by the Libraries in a single year. All 450 workstations were either upgraded or replaced.

- The 5,000 square feet expansion of the Law Library was completed and wireless computer services were introduced.

- The results of the LibQUAL+ user survey placed UM Libraries in the 40th percentile of all participating libraries. We have undertaken many of the improvements requested by users including upgrading computer equipment, improving access to electronic resources and better quality photocopier equipment. (See Appendix 1)
• The Libraries examined the University’s new strategic plan, “Building for a Bright Future” at a full-day retreat. The University’s Five Strategic Priorities were reviewed and Libraries goals were developed which focused on how the Libraries can support the Universities strategic priorities. The data and goals resulting from the retreat are attached in Appendix 2.

• New Technology Plan was developed that charts a direction for the libraries that is consistent with current technology trends.

• A cross-section of 40 Libraries staff reviewed a draft strategic framework for the Libraries which was developed from our current strategic plan, Agenda for Tomorrow, 2001-2004 and from the Libraries’ resource planning submission. Our next strategic plan will be built on this framework.

• Increased focus on Staff Learning and Development.

The Libraries have been recording public services statistics as indicators of activity and a 6-year chart included in Appendix 3 shows a number of interesting trends. While in 2003-2004 the total number of items circulated (print) is declining (14%), the number of visits are registered by turnstile count continues to increase (7%). This increase, along with huge increases in the use of electronic resources (electronic reserves materials 66%, hits on the Libraries web site 90%) suggests that students are making extraordinary use of the new media. Three charts show this remarkable upsurge. This trend is evident in all research libraries. While it is possible to access all electronic resources remotely many users prefer to visit the Libraries. The Libraries continues to have a strong role as “place” in the lives of students, faculty and staff.

The following is an overview of the achievements, activities, and issues that engaged the University of Manitoba Libraries for the reporting year. These highlights provide a sense of the challenges facing academic research libraries and the alternative solutions being advanced by the University of Manitoba Libraries as we move forward to fulfill our mission and position the libraries to offer high caliber electronic resources and services.

Submitted by:
Carolynne Presser, Director of Libraries
carolynne_presser@umanitoba.ca
2. **COLLECTIONS**

2.1 **Acquisitions Budget**

The acquisitions budget received a $500,000 budget-only increase in 2003-2004. The total acquisition budget of $7,735,351 was allocated as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monographs</td>
<td>$1,049,904</td>
</tr>
<tr>
<td>Serials (including “Big Deals”)</td>
<td>4,578,122</td>
</tr>
<tr>
<td>CNSLP</td>
<td>584,466</td>
</tr>
<tr>
<td>NETDOC</td>
<td>613,698</td>
</tr>
<tr>
<td>Binding (Including Thesis)</td>
<td>176,200</td>
</tr>
<tr>
<td>PST</td>
<td>275,000</td>
</tr>
<tr>
<td>GST</td>
<td>16,000</td>
</tr>
<tr>
<td>Postage</td>
<td>140,000</td>
</tr>
<tr>
<td>Collection Appraisal</td>
<td>6,500</td>
</tr>
<tr>
<td>Contingency</td>
<td>218,107</td>
</tr>
<tr>
<td>CISTI Source/Divine</td>
<td>77,354</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$7,735,351</strong></td>
</tr>
</tbody>
</table>

2003-2004 is the first year the Libraries bore the complete cost of CNSLP without the support of provincial and CFI funding. In 2002-2003 an amount of $288,652 was set aside as part of the Libraries’ CNSLP “exit strategy”. The CNSLP consortium negotiated a deal with Elsevier to provide access to their journals going back to 1998. Next year, a base budget increase to acquisitions will be vital in order to sustain the commitment to CNSLP, while still funding other priorities such as monograph acquisitions.

The NETDOC budget of $613,698 covered the anticipated cost increases in NETDOC products and the additions of the new titles. NETDOC now supports 185 titles. (See Appendix 4)

Serials allocations for 2003-2004 were based on the previous year’s expenditures, rather than the previous year’s budget, in order to avoid serials cancellations in some units while simultaneously leaving other units with more budget than required to maintain their collections. Savings from the summer project to substitute electronic access for print were larger than expected and the projected 12% increase in the cost of serials was offset by the favourable foreign exchange rate.

As a result of lower renewal costs for the “Big Deals” (groups of electronic journal titles selected by the vendor and sold as packages at less cost per title than if the journals were purchased individually) and higher savings than projected from the print substitution project, the Libraries were in a position to make additional commitments at year-end.

The favourable foreign exchange resulted in an estimated $1.0 million in unexpected savings and allowed for the purchase of expensive monographs, multi-volume sets and back files, electronic and microform products as well as sets of bibliographic records. At year-end, the Acquisitions budget was in a positive position, with a modest carryover.
2.2  **Gift Funds**

The balance for 221 gift funds at year-end was $270,994.

Plans to set up interest bearing trust accounts for each unit to receive donations for acquisitions, and to generate additional income for acquisitions, did not proceed as the University’s Budgets and Grants unit indicated that this option was no longer available.

2.3  **Acquisitions Department**

Work in Acquisitions over the year focused on financial accounting, serials management, vendor evaluations, and staff development.

The purchase of “Big Deal” electronic packages continues to mean that acquisitions related work for titles in these packages was done in the Acquisitions department for all libraries. Considerable review and evaluation went into setting up processes and standards for handling Law Library and Neil John Mclean Library’s cancellations, purchase orders, payments, claims, and check-in records. For each “Big Deal” package, separate fund IDs were established to facilitate tracking of expenditures, as well as savings for the unit libraries.

Staff vacancies through two long term medical leaves and retirement forced the Department to review and reassign a variety of staff responsibilities and duties. This reassignment provided the opportunity for staff to expand their range of experience and expertise as well as demonstrate their resilience and continuing commitment to the department.

2.4  **Electronic Resources**

During 2003-2004 the Libraries acquired a number of electronic journal packages. These “Big Deals” appreciably extended the Libraries’ offering of journals, in many instances re-establishing access to titles which the Libraries had subscribed to in print, but had been forced to cancel in serials cancellation projects over the past 15 years. In the closing weeks of the fiscal year, the unit successfully licensed and activated 31 new electronic resources valued at $875,000. The Libraries supports approximately 17,000 electronic journals.

During the year nine high impact electronic journal accounts were activated:

- Berkeley Electronic Press
- Blackwell Synergy
- BioMed Central
- British Medical Journal
- Kluwer Law
- Lippicott Williams and Wilkinson
- Marcel Dekker
- Nature Publishing Group
- PsychArticles

Three high impact eBook accounts were activated:
The unit continues to negotiate direct custom agreements, forging substantial improvements in access and financial savings of approximately $75,000. The unit continues to participate as an active member of the COPPUL Licensing Advisory Group and works closely with the Executive Director to support the diverse licensing needs of COPPUL.

2.5 Bibliographic Control

Highlights of fiscal year 2003-2004 include: planning, training and MARC record preparation for the migration from DRA to Sirsi, the final year of the Automated Authority Control Project, and a variety of activities aimed at providing increased access to electronic resources.

The COPSE funded four-year Automated Authorities Project officially ended on March 31, 2004. During the Authority Project’s four-year span, 1,243,188 bibliographic records in BISON prior to December 2002 were extracted and sent to A-G Canada for automated processing. Approximately 700,000 accurately matched authority records (684,998 LC and NLC names and subjects, and 14,444 MeSH) were imported. An extensive authority structure is now in place and future work will focus on maintaining its accuracy as well as adding additional authority records as appropriate.

The department’s work in outsourcing continues to attract visitors. This year representatives from the University of Saskatchewan met with the Head of Bibliographic Control to discuss outsourcing experiences. The department continues to support the Library Technician Program at Red River Community College by providing job placements for its students.

2.6 Collections Management

Three major themes emerge from a review of Collections Management activities in 2003-2004: the continuing migration from physical to electronic collections; a rise in curriculum change proposals; and the positive effect of the strong Canadian dollar on acquisitions and collections.

The strong performance of the Canadian dollar in 2003-2004 meant that the Libraries had considerable funds left at the end of the year. This was true for the general Blackwell’s approval plan as well - $50,000 from the plan was diverted to special one-time purchases in February and March 2004. Collection Management was also able to assist the Associate Director for Collections, with some year-end acquisitions notably that of Early English Books Online.

Acting to facilitate the transition from print to electronic journals, Collection Management coordinated a project in the summer of 2003 that involved the cancellation of print-equivalent serials while migrating users to the electronic versions received through a number of “Big Deal” packages. Collection Management continues to work on the electronic thesis project, working with the various library units involved and the Faculty of Graduate Studies. Electronic theses have been targeted by the Institutional Repository Group as the first “collection” in UM Libraries’ proposed repository. Collection Management was also involved in the implementation of the E-Journal Access/Linking
Task Force’s recommendation to acquire SFX software to facilitate the seamless linking by our users to electronic full text from NETDOC databases.

2.7 Curriculum Change

The increase in curriculum change this year reflects faculty renewal, an increased interest in the development of interdisciplinary programs, market demands for graduates with more sophisticated training in technical areas, development of research groups especially those supported by large grants, and a need to offer courses and programs that are attractive to students and competitive with those at other institutions. Assessments for the curriculum and course change and for the review of graduate programs continue to show that the Libraries’ journal collections have improved significantly in the last few years, but that monograph collections need improvement across all disciplines.

The Senate Committee on Curriculum and Course Change met six times in 2003-2004, and approved 71 new or revised undergraduates courses, and one revised program. In addition, the Committee approved one new certificate program. Graduate Studies’ Program and Planning Committee approved 44 new or revised courses and four new programs. Bibliographers’ library support statements identified one-time needs for these curriculum changes of $17,696 and ongoing needs of $35,760 which $31,960 was for ongoing serial needs.

Major weaknesses identified in the collections for graduate courses were mainly in serials and monographs in the areas of school psychology and international literatures in English. The most expensive journals requested, each costing $5,800 CAD were two titles that are also heavily requested through Document Delivery: *International Journal of Remote Sensing* and *Water Science & Technology*.

Collections Management coordinated the preparation of a library support statement for the new Interdisciplinary Ph.D. in Applied Health Sciences. This involved input from five bibliographers from the two campuses.

Although the Coordinator of Collections Management was appointed to the Health Sciences Program Committee to represent the Libraries, this committee did not meet in 2003-2004.

2.8 Graduate Program Review (GPR)

Nine graduate program reviews were completed since the last annual report: Education, Chemistry, Botany, Microbiology, Zoology, Physics & Astronomy, Pharmacy, Pathology, and Surgery. In general, these reviews demonstrated that our serial collections are stronger than our monograph holdings, though they have also identified requests for journal subscriptions of a significant nature: $17,556 required for chemistry, $27,174 for botany, $17,586 for microbiology, and $26,721 for physics.

Since June 2002, 17 graduate programs were reviewed.
2.9 **Conspectus Project**

Conspectus lines for botany and zoology (Biological Sciences Division) were assessed in 2003-2004, bringing the total lines completed in this division to 83%. In the Law Division, 179 of 332 (54%) lines were completed this year. A number of lines were completed in the Language, Linguistics, and Literature Division, bringing the total up from 35% to 40%. The total number of lines completed thus far (excluding LCC Medicine) is 5,938 of 8,671 or 68%. There has been a 7% increase since last year in the total number of lines completed.

2.10 **Electronic Theses Project**

As a member of the Institutional Repository Team and because Collection Management has had a history of working with Graduate Studies on electronic theses, the Coordinator of Collections Management continued this liaison work. Both Graduate Studies and the Vice-President (Research) contributed funds to send her to the 6th ETD Symposium in Berlin in May 2003. With the assistance of the Manager of Digital Library Planning and Development and with advice from Library and Archives Canada, she made a presentation to Graduate Studies and its Committee on Electronic Theses Submission. The presentation focused on the value of continuing to participate in the Theses Canada contract with UMI, the value of using open access rather than UMI’s proprietary software, and the merits of having an etd repository for UM theses here. The Coordinator of Collections Management on behalf of the repository team and the Libraries negotiated a process with Graduate Studies for the etd pilot, which is set to begin in the fall of 2004.

In conjunction with the initiatives, the Coordinator of Collections Management arranged a visit on May 20, 2004 with Sharon Reeves, Manager, Library & Archives Canada.

2.11 **Migration of Electronic Journals/Cancellation of Print Projects**

With the assistance of Acquisitions and Electronic Resources, Collection Management coordinated this migration project in the summer 2003, which involved the cancellation of print-equivalent subscriptions to electronic journals received through the “big deals”. This involved the potential cancellation of 824 subscriptions at 13 units from the following “big deal” packages: Annual Reviews, BioOne, Elsevier (including Harcourt), Kluwer, LWW, Oxford UP, Project Muse, SIAM, and Wiley. The initial estimate of potential savings was determined when the budget was set in June 2003 at $827,647, although a later estimate by Collection Management found that the value of the cancelled titles was likely higher.

In total 739 print-equivalent subscriptions were cancelled and 84 were retained. Of the 84 subscriptions, 45 involved implications for the budget. The ongoing cost of retaining the 45 titles was calculated to be approximately $32,000 CAD at 2003 prices. Journals were retained because of: poor image quality, missing information, and significant delays in the publication of the electronic version, exclusion of a title from the e-journal “Big Deal”, or because the print version was acquired as a gift-in-kind, as an invoiced adopt-a-journal, or through endowment or gift funds.

---

1 The Conspectus Project methodology compares a library’s collection in a particular subject area with its present ability to purchase in that field and its collection goal for that subject area based on current programs of teaching and research.
2.12 **Canada Research Chair Assessments**

In 2003 six assessments for new research chairs were completed and are as follows:
- History of Western Canada
- Micro Electronic Materials
- Psychiatry – Palliative Care
- Stored Grain Eco-Systems
- Neurosciences/Mental Health RTI (Developmental Neuropathology)
- Conducting Polymers and Electronic Materials

2.13 **Adopt-A-Journal Program**

**Statistical Overview**

<table>
<thead>
<tr>
<th>Campus</th>
<th>Year</th>
<th>No. of Titles</th>
<th>Institutional Subscription Value</th>
<th>No. of Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fort Garry</td>
<td>2002-2003</td>
<td>122</td>
<td>$74,774</td>
<td>88</td>
</tr>
<tr>
<td></td>
<td>2003-2004</td>
<td>153</td>
<td>$67,755</td>
<td>85</td>
</tr>
<tr>
<td></td>
<td>2002-2003</td>
<td>78</td>
<td>$80,654</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>2003-2004</td>
<td>56</td>
<td>$67,970</td>
<td>24</td>
</tr>
<tr>
<td>Bannatyne</td>
<td>2002-2003</td>
<td>200</td>
<td>$155,428</td>
<td>124</td>
</tr>
<tr>
<td>TOTAL</td>
<td>2003-2004</td>
<td>209</td>
<td>$135,725</td>
<td>109</td>
</tr>
</tbody>
</table>

The strength of the Canadian dollar resulted in the lower value of donated titles despite the slight increase in the number of donated titles.

2.14 **Book Sale**

The Libraries’ annual Book Sale was held in November 2003. The net profit, after expenses were covered, totaled $10,174. Proceeds were used to purchase the following acquisitions:
- *Antiquités africaines* (7 volumes)
- *Archaeology of Fazzan 1: synthesis*
- *Bergey’s manual of systematic bacteriology* (2nd edition)
- *Encyclopedia of democratic thought*
- *Encyclopedia of government and politics* (2nd edition)
- *Encyclopedia of leadership* (4 volumes)
- *Encyclopedia of the Arctic* (3 volumes)
- *Environmental law* (2nd edition)
- *Enzyme handbook* (volume 14)
- *Handbook of enzymes: synonym index*
- *Health monitoring of aerospace structures: smart sensor technologies and signal processing*
- *Inorganic synthesis* (volume 30-32) and *Collective Index* (volume 1-30)
• Lampes antiques d’Algérie
• Mitchell, Taylor and Talbot on confiscation and the proceeds of crime (3rd edition)
• The police gazette (3 parts). (The cost to be shared by the Book Fund and the William & Grace Haney Memorial Library Fund)
• The sweetness of life: a diabetes story television series

2.15 Gifts-in-Kind

There was an increase in the number of gift collections offered to the Libraries, particularly in response to a general call for Book Sale donations. A total of 15 gift collections were received and processed in 2003. A considerable amount of time went into visiting donors and packing collections, as well as into the usual tasks of selection, appraisal, receipting and preparation for cataloguing.

Of particular note are the following items:
• Ralph Stanton: The entire donation was noteworthy. It included an Aldine edition of Petrarch sonnets (1533), with an art deco binding by Rene Kieffer, a facsimile of the 1734 edition of Moliere’s plays in six volumes; and a 1652 Elsevier edition of Plautus’s Comedies.
• Sybil Shack: Two titles worthy of mention are Balfour, Alexander, Contemplation and Other Poems (Edinburgh: William Watson, 1820) and Guthrie, William, tr. Catullus (T. Waller, Crown and Mitre, 1745).
• Doris Saunders: a Johnson Dictionary, abbreviated (Dublin: Ewing, 1768); Shakespeare Comedy of Errors 4th Johnson and Steevens [sic?] ed; and Birney, Earl, David (Toronto: Ryerson Press, 1942) with the author’s annotations.

2.16 Notable Additions to the Collections Print and Electronics

—— Added to the collections in the Albert D. Cohen Management Library was:
• the four volumes of Encyclopedia of Leadership.

—— The most notable addition in the E.K. Williams Law Library was the 128 volume collection of the 10th and 11th series of West’s Decennial Digests.

—— Notable additions to the Elizabeth Dafoe Library include:
• the Oxford Dictionary of National Biography
• the Sage Encyclopedia of Social Science Research Methods
• the Encyclopedia of Primary Prevention and Health Promotion
• the Encyclopedia of Atmospheric Sciences
• the Encyclopedia of Global Environmental Change
• the Encyclopedia of Environmental Science
• the Oxford Encyclopedia of Economic History
• the Holocaust Literature: an Encyclopedia of Writers and Their Work
• the Encyclopedia of Food Sciences and Nutrition
• three volumes of the History of the Graeco-Latin Fable
• the Indigenous Peoples and Environmental Issues: An Encyclopedia

—— The **Microform collection** in Elizabeth Dafoe Library expanded with the addition of:
• a collection of advice books *Advice Literature in America, Part I, Collection of Etiquette*
  from the Arthur and Elizabeth Schlesinger Library on the History of Women in America
• the *Church Missionary Society Archive: Section V The Americas and Section VI Missions to India*
• the *Winnipeg Morning Telegram* - June 9, 1898 to August 21, 1907
• the *Winnipeg Voice* – May 8, 1897 to July 26, 1918
• Early English Books Online – Web site
• Empire Online – Web site
• Palmer’s Index to the Times, – Web site

—— The **Father Harold Drake Library**, acquired several significant new titles this year. The revised edition of the *New Catholic Encyclopedia*, the entire CD-ROM backfile of *Osservatore Romano*, and the Edward Mellen Press Collection (82 titles to fill in the gaps in the Catholic Studies collection and to build in the area of peace and conflict resolution studies).

—— At **Neil John Mclean Health Sciences Library**, an assessment tool collection for the School of Medical Rehabilitation is being developed. The reference collection was enhanced with purchases for the Dental, Health Sciences and Medical Rehabilitation collections. The collection consists of the original assessment tools or instruments used to measure rehabilitation baselines or outcomes in patients. The 12 rehabilitation journal titles added to the collection are:
• Assistive Technology
• British Journal of Hand Therapy
• Disability and Rehabilitation (online)
• Disability and Society
• Journal of Musculoskeletal Medicine
• Journal of Prosthetics and Orthotics
• Orthopaedic Division Review (CPA Ortho Division)
• OT Practice
• Physical Therapy Reviews (online)
• Psychiatric Rehabilitation
• Proceeding of the Annual Conference/RESNA
• Technology and Disability (online)
— The Carolyn Sifton-Helene Fuld Library (St. Boniface General Hospital) is building a collection of material relating to palliative care, bereavement and death.

— The Sciences and Technology Library purchased electronic backfiles for Biological Abstracts (to 1969) and Zoological Record (to 1978).

2.17 Archive Collections (Acquisitions and Appraisals, Arrangement and Description)

A total of 118 fonds/collections were accessioned in 2003-2004. They included 80 Manuscript Archives (MSS) (124.8 linear metres) and 38 University Archives (UA) (71.3 linear metres), for a total of 196.1 linear metres. Notable MSS accessions included those of Doreen Bobbit (a graduation bracelet that once belonged to Science '36 graduate Kathleeen Schafter); records of the musical “You Can’t Beat Fun”; a large donation from premier Edward Schreyer; the letters of W W I soldier Vaughan Watt; 90 years of Czas newspaper (Polish); albums from wildlife artist Angus Shortt; a further accession of Canon L. Wilmot papers; and a transfer from the National Archives of the archives of Botanist Reginald Buller. Within the Archives of the Ukrainian Canadian Experience, historic photos of Ukrainian Canadians and their homesteads were received from artist Bill Lobchuk, and Parks Canada donated 10 photographs depicting Ukrainian Canadian pioneers in Alberta. The collection was housed in the Ukrainian Cultural Heritage Village near Elk Island, Alberta. University Archives transfers included those from the President’s Office; the Faculty of Engineering; Continuing Education; the University Secretariat; the School of Art; and the Comptrollers Office.

Records of 27 fonds/collections were appraised by National Archives Appraisal Board (NAAB) for a total of $77,475. Notable appraisals included those of Professor Gerald Friesen; the Stobie Family; educator and activist Sybil Shack, writer Melinda McCracken, prospector Kathleen Rice; and grain company Agricore United.

Funding of $16,000 from the Faculty of Arts and a grant of $7,182 from Young Canada Works allowed Archives us to hire students from the Master of Archival Studies for the summer. The students processed the Nick Roscoe photographs and negatives and it was learned the negatives are actually nitrate and as such are highly flammable and explosive. The negatives will be placed in cold storage to minimize any risk attached to storing these materials. The Riley family papers (two sisters who attended the University of Manitoba in the 1920s) were processed. The collection on the sisters was published in the University’s alumni magazine On Manitoba. The Seetner accession, and the fonds for Marion Lewis, Kathleen Rice, Doris Saunders, Carol Matas, Babs Friesen, J.L. Charles, and University publications, along with the Faculty of Engineering’s collection of lantern slides, the papers of J.J. Bell, and the photos of Sybil Shack were also processed by the students.

The site for the Canadian Wartime Participation project was completed. The 9620 images of documents and photographs were scanned from a number of fonds relating to Canada’s participation both at home and abroad. Researchers wrote modules for grades 4, 6, 9 and 11 students and teachers of history relating to this subject. The project was partially funded by a Canadian Council of Arts CAIN grant of $24,500.
2.18  Aboriginal Health Collection

The Aboriginal Health Collection continues to be an important resource for university and hospital staff and students from the University of Manitoba and other post-secondary institutions. The collection contains over 2,000 books, videos, reports and educational resources. The Aboriginal Health Librarian teaches patrons how to locate items in the collection and articles from the professional literature. Links to key resources on Aboriginal health are provided from the Neil John Mclean Health Sciences Library.

Circulation and usage of the Aboriginal Health Collection continues to grow each year. There was an increase in total circulation from the previous year of 30%. In addition, it is felt that more faculty and students are locating references to articles in Medline and the Aboriginal health section of the Neil John Mclean Health Sciences Library web site when they are referred to the Aboriginal Health Librarian or signup for an instructional session. Patrons are benefiting from the wider selection of resources they are able to locate in consultation with the Aboriginal Health Librarian.
3. **INFORMATION SERVICES AND SYSTEMS**

Information Services and Systems cover five areas: Information Services, Information Literacy, Document Delivery, Libraries Electronic Technologies and Systems and other administrative and service responsibilities.

3.1 **Information Services**

Libraries made improving access a priority. Users, through the results of the LibQual+ survey conducted last year, told us that “access” was one of the most important improvements they wanted the Libraries to make.

The LibQual+ survey was completed in March 2003 and the results received in July 2003. The results indicated that the Libraries fell short of performing at the users’ desired level in all areas measured. In some areas, the Libraries are perceived to be performing below the minimum level determined by the user. These areas are: availability of print and/or electronic journals and other materials, access tools for unmediated service, need for updated equipment, and remote access. The results were also analyzed according to user groups. Graduate students gave the libraries the lowest grade, whereas undergraduates had the most positive opinion of our resources, services and facilities. The faculty response was just a little more positive than the graduate students.

The LibQual+ survey provides the opportunity to compare our results against all other participating ARL institutions using published norms. This analysis shows the Libraries falls in the 40th percentile. That is, 40% of institutions performed worse than UML, 60% performed better. This result was achieved in each of the four areas measured.

The Libraries published a table listing improvements the users identified, and how we responded. (Appendix 4). The survey results and our response were widely publicized throughout the University community through the UML web site, print publications and on UMFM, the campus radio station.

The Libraries launched UM Links in November immediately improving access to our resources because the user can move directly from a citation in a database to the full text of the corresponding article. This new service was immediately popular. In the month of March it was used 125,000 times. Another example of improved access to our resources this year includes the improvements made to the Libraries web site. The use of our web site increased from 16.5 million page hits in 2001-2002 to 31.4 million page hits in 2003-2004, an increase of 90%. Two factors contributed to this increase, the new web site design implemented in September 2002, and the increased content on our site created over the last year.

Additional funds from the Vice-President (Academic) and Provost allowed the Libraries to increase hours of operation from November through April 2004. The extra hours afforded the students additional access to Libraries facilities. For the first time users had evening access to technical assistance in the Libraries as the LETS Help Desk also extended its hours.
3.2 Information Literacy

The Information Literacy group devoted substantial effort this year to creating an information literacy plan that will revolutionize the relationship between the Libraries and faculty. It calls for the integration of information literacy skills into the curriculum as well as for the application of learning outcomes and assessment tools based upon ACRL information literacy standards.

The following goals were derived from the Strategic Plan for Information Literacy:

1. To create a comprehensive information literacy (IL) program based upon ACRL standards, which will be incorporated into the University of Manitoba’s academic curriculum.
2. To establish a supportive learning environment for librarians teaching the information literacy curriculum.
3. To develop an information literate community at the University of Manitoba.
4. To collaborate with other institutional partners to develop and promote a provincial Information Literacy strategy.

3.3 Document Delivery

Document Delivery activities continue to increase. Borrower activity rose by 17.9%, and a number of new services continue to decrease turnaround time for receipt of material. These include Library Express, expanded functionality of Relais and use of OCLC ILL web feature to order material online from U.S. libraries.

3.4 Libraries Electronic Technologies and Systems (LETS)

The reorganization of LETS into three groups – Digital Library Planning and Development, BISON Services, and TEC-NET continues to prove effective.

In almost every area of the Libraries staff have been laying the groundwork for providing new and improved services and systems in the coming year and beyond. One very significant example was the development of the Libraries New Technology Plan. The plan sets out strategies for the Libraries to build a significant digital collection while providing ever more effective access to its services and valuable print collections.

3.4.1 Digital Library Planning and Development

The Digital Library Planning and Development group is responsible for developing and introducing new information technology applications for the Libraries.

During 2003-2004, the Digital Library Planning and Development group introduced several new technologies, some of which included Java programming technologies, new communication protocols in document delivery, and open URL standards technology.

The implementation of EZ-Proxy software eliminated the need for patrons to configure their web browsers to access databases and e-journals. EZ-Proxy substantially reduced calls to the Help Desk regarding proxy access to electronic resources.
New web content was created with the Winnipeg Building Index and the Archives War Experience project. Both of these collections have unique U of M material, slides and photographs that were digitized to increase access to the material.

3.4.2 BISON Services

BISON continues to be the primary system of the Libraries. It is one of the most stable systems available on campus, and the busiest. In a single month there are as many as 4 million transactions recorded, and as of March 31, 2004 there are 3,604,466 MARC records in BISON.

The major activity for the year was the preparation for the migration to Sirsi. The new system went “live” as scheduled on July 5, 2004.

3.4.3 TEC-NET (Technology Support and Network Services)

The poor performance of the Libraries public machines and the upcoming demands of the new integrated system and our new electronic resources necessitated the most ambitious computer renewal plan ever undertaken by the Libraries in a single year. All 450 machines were either upgraded or replaced.

Help Desk: The LETS Help Desk continues to provide essential services to Libraries staff and users. This year the Help Desk offered evening and weekend hours from January through March. At these times the desk was staffed by student help who fielded 217 calls, over half of which they were able to complete themselves.

Security: Three viruses and a major vulnerability in Windows NT, 2000 and XP had a strong impact on the University network during the summer of 2003. At the height of the problems IST was publishing long daily logs of infected machines. TEC-NET dealt with the attacks quickly by using network utilities. Even though the Libraries were not hit as hard as the rest of the University, it took about a month of work to ensure that our network was not compromised. TEC-NET is regarded as a leader on campus in handling security issues and was asked by the University’s LAN Coordinators group to describe the Libraries security methods.

Photocopier Services: A report on photocopier replenishment was prepared along with a copier procurement plan and model justification. Libraries staff and over 100 students provided feedback on three demonstration machines. The copier staff also did their own exhaustive testing of the demonstration models. Thirty-one new Kyocera photocopiers will be purchased in 2004-2005.

Wireless Access: Efforts to offer wireless patron laptop service had the TEC-NET group working closely with IST. The Law Library is the first library to offer wireless patron laptop service as a result of the TEC-NET group working closely with IST. We expect to extend this service to other UM libraries in 2004-2005.
3.5 **Initiatives in Unit Libraries**

Following are highlights of initiatives undertaken at several libraries throughout the year.

**Architecture/Fine Arts**
- Work commenced on the *Winnipeg Architecture: Images and Text* project (funded by a $7000 Winnipeg Foundation grant). Meetings were held to organize this project and progress was made on the design and development of the database. Entering of data and scanning of slides will continue later in the year. An upgraded computer and peripherals were purchased but are not yet installed. Permission was received from the Foundation to extend the project into year 2004-2005.

**Archives & Special Collections**
- A grant from the Heritage Grants Advisory Committee for $5,638 allowed Archives to enter 15 file sets and 8 fonds level descriptions of unprocessed agricultural collections into the archives of the Agricultural web site.
- Archives hired a Master of Archival Studies student for the summer from funding received from both the Faculty of Arts for $16,000, and a Young Canada work grant for $7,182.

**D.W. Woods Education**
- The library hosted two “story times” for the children of Campus Daycare, which included puppet shows. They are looking forward to doing more of these for our “future students”.

**Elizabeth Dafoe Library**
- The Elizabeth Dafoe Library Graduate Student Lectures were inaugurated this year and were well received. The series provided seven University of Manitoba Graduate Students with an opportunity to present lectures based on their own research.
- In February 2004, the Office of University Accessibility announced a new Aboriginal Youth Summer Employment program which grants up to $2,900 to subsidize the wages of Aboriginal students working in University of Manitoba units. Elizabeth Dafoe Library submitted a proposal and successfully received one of the grants.
- The staff of Reference Services offered instruction sessions attended by 3,807 students. The total contact hours of instruction were 188 hours.
- A major innovation this year was the introduction of the virtual reference service, using OCLC’s QuestionPoint software. The service began in October 2003 with “Basic Chat” and the enhanced version was added in February 2004. Several of the Reference staff expressed an interest in the service and received training during the summer and in January 2004. The hours of service are Monday to Friday, from 1:00 to 5:00 p.m. and there were 12 staff members who volunteered each month to provide this service.

**Neil John Mclean Health Sciences Library (NJMHSL)**
- The NJMHSL received additional baseline funding of $98,331 for collections and staff due to increased enrollment on the Faculty of Medicine’s undergraduate medical curriculum, the School of Medical Rehabilitation and Residents.
• The NJMHSL received donations totaling $900,699 including a $867,000 donation bequeathed by Dr. Georgina R. Hogg to NJMHSL for the purchase of electronic consumer health materials.

• Support services for Personal Digital Assistants (PDAs) was introduced. PDAs or handheld technology is quickly becoming commonplace in the practice of medicine. PDAs are a useful tool in clinical, teaching and research settings because they can provide users with information at the point of need. They are capable of holding staggering amount of data thus creating a “walking library” that includes products such as textbooks, drug references, diagnostic calculators, patient management tools, radiologic images and image viewers.

• The NJMHSL Archives received 5 notebooks and journals from the late 1800s belonging to John Orchard Todd (1864-1929). One of these included an account of Manitoba’s first brain operation in 1889 that enhanced the value of the photograph of the patient that was already part of the Archives collection.

• Marion Lewis gave photographs and biographic material as well as scientific papers from her tenure in Medicine. We directed these last to Archives & Special Collections at the Fort Garry campus as it was felt that, as they were complementary to Bruce Chown’s papers already deposited there, they would be more appropriately accessible if they were in the same place.

• Another initiative undertaken this past year was the official launch of the “House Calls” program. House Calls provides training in the use of the Library catalogue for HSC staff and residents, as well as UM faculty, staff and graduate students at the Bannatyne campus. Patrons can request a visit to their office, lab or departmental meetings for an individual or small group training session. Each session is designed to meet the expressed needs and interests of the patron and is scheduled at a time convenient for the patron. A brochure is being developed to market this new service and additional methods of informing our patrons about House Calls will be utilized.

Fr. Harold Drake Library, St. Paul’s College

• The St. Paul’s College Library Committee organized a library celebration event. The focus was the arrival of the revised edition of the New Catholic Encyclopedia. The event, held at the entrance to the Library, was well attended by College staff and attracted the attention of students as well. An article on the event will appear in the College publication The Belltower.

E.K. Williams Law Library

• The Faculty of Law and IST with assistance from LETS embarked upon a pilot project to make the Law Library the first official test site for wireless access within the University of Manitoba.

• 5,000 square feet were added to the top floor of Robson Hall expanding the space in the Law Library by 30% and providing additional stack, study space, as well as a conference room and offices for researchers.
4. LIBRARY DEVELOPMENT

4.1 Gifts, Grants and Donations

Highlights of donations received in the units during 2003-2004 in support of the Libraries’ collections and services included:

Archives & Special Collections
- $16,000 - funding from the Faculty of Arts
- $7,182 - grant from Young Canada
- $5,638 - grant from the Heritage Grants Advisory Committee

Unit Libraries:

Albert D. Cohen Management Library
- $143,137 - financial support received from I.H. Asper School of Business to support journal and book acquisitions, business database “ProQuest”, and for increased library hours during exams

Architecture/Fine Arts and Music Library
- Donation of W.P. Thompson, Professor of Architecture personal collection of images which he used throughout his career in both the classroom and in his own research. This donation of approximately 20,000 slides plus documentation will strengthen our holdings of architecture, urban settings, landscape and social history.
- The Libraries was gifted the collection of the late Professor Jeffrey Cook. He was a graduate of the UM School of Architecture, and at the time of his death, was a professor at the Faculty of Architecture at Arizona State University and a recognized expert in solar architecture. His collection of approximately 8,000 volumes will be located in the Architecture/Fine Arts Library, the E. Dafoe Library, other UML units, as well as Special Collections in Archives.

D.S. Woods Education Library
- $10,570 - grant from the Education Endowment Fund for the purchase of Instructional Materials and materials in Inclusive Special Education

Donald W. Craik Engineering Library
- $4,100 - received funding to support 2 Research Chairs: Stored Grain Ecosystems and Microelectronic Materials

Elizabeth Dafoe Library
- $3,000 - grant from the Japan Foundation for the Library Support Program
- $1,600 - gift collection of 40 Icelandic music CDs from Iceland’s National Radio
E.W. Williams Law Library

- $12,000 - received funding from the Asper Chair International Business & Trade Law to purchase relevant materials for the library
- $6,000 - Received a donation of books from Professor Anne McGillvray

Neil John Mclean Health Sciences Library

- $868,484 - donation bequeathed by Georgina R. Hogg Estate for the purchase of electronic and consumer health materials
- $17,909 - grant from Keewatin Regional Health Authority
- $5,000 - grant from Burntwood Regional Health Authority
- $2,000 - donation from Mary Beamish
- $1,389 - grant from First Nations & Inuit Health Branch

Sciences & Technology Library

- $12,246 - funding from the Haney Fund to purchase books for the Department of Physics and Astronomy
- $6,000 - received from the Faculty of Science Endowment Funds to purchase books in the areas of botany, zoology and computer science
- $500 - funds from the Faculty of Pharmacy Endowment Fund to purchase pharmacy books
- Three substantial gift collections received this year were: Dr. Harley Cohen, Dean Emeritus; and the Faculty of Science donated over 700 volumes in the areas of applied mathematics and engineering. Mr. L. Kilburn donated a collection of older geological material, and Mr. M. Tulloch donated approximately 600 recent computer science books. Several smaller gift collections were received as well.

William R. Newman Library (Agriculture)

- $11,500 - funding from the Faculty of Agriculture and Food Sciences Endowment Fund to purchase recently published reference books, and to purchase $1,500 of books to support advanced animal nutrition course and research
- $691 - funding from the Skinner Memorial Fund
- $100 - donation from Maurice and Catherine Tauber to purchase a title on entomology
- Seventeen titles on plant pathology and the history of agricultural sciences were purchased from the Estey Family Endowment Fund
5. OUTREACH

Following are highlights of outreach activities that took place in the Libraries during 2003-2004.

Archives & Special Collections

- The Archives of the Ukrainian Canadian Experience was launched on April 9, 2004. Tours for various groups were: Alpha Omega Alumnae – the Ukrainian Womens’ Graduate Association, the Ukrainian Museum of Canada, and the Ukrainian Professional and Business Club.
- A lecture entitled “The Evidence of Life After Death – Researching the T.G. Hamilton Collection” given by Walter Meyer zu Erpen was attended by over 200 people.
- A donation of the entire bound issues of Czas from 1914 to 2002 was received from the Board of Czas-Polish Press Ltd. A recognition event was held January 2004.
- The University of Manitoba Students' Union Archival Walk was launched on April 21, 2003.
- The Dr. Andrew Taylor Northern Studies Award and Research Grant was approved by University of Manitoba Senate on December 3, 2003. The first recipient of the Dr. Andrew Taylor Award for $1,000 was awarded to Angela Heck.
- The Remembrance Day display featured the papers of World War I soldier, Vaughan Watt, from Birtle, Manitoba. Vaughan was killed in action and his letters were donated by his great-niece Gwen Zingler.
- The annual J.B. Rudnyckyj Lecture was held in October 2003. Denis Hlynka, Acting Director of the Centre for Ukrainian Canadian Studies gave a paper entitled “A Day in Hollywood, A Night in Ukraine, and a Stop Over in Winnipeg”.
- Materials were provided to the University of Calgary’s “Our Roots” web site, which features printed Canadiana.
- Publicity on Archives was featured in 36 articles or reports in various publications, and two radio interviews were held.

E.K. Williams Law Library


Elizabeth Dafoe Library

- A library instruction session was held at the Louis Riel School Division offices for the Education graduate students in September.
- Presentations and tours were given to members of the Ukrainian Canadian Community for both the Slavic Collection and the Archives of the Ukrainian Canadian Experience. Participants became more familiar with the activities of the University of Manitoba’s Libraries, and in preserving the memory and heritage of Ukrainian Canadians.
- In 2003-2004 tour groups from Iceland visited during June and August. Each tour group included more than fifty participants.
• The Iceland Reading Room was used for classes conducted by the Snorri West Program (a Manitoba exchange program for university students from Iceland). Many of the local Icelandic community’s cultural organizations continue to regularly use the seminar room for monthly meetings and presentations. During 2003-2004 the Iceland Reading Room hosted many visiting researchers from throughout North America and Iceland, with the primary attraction being the Collection's holdings of Icelandic Canadiana. Iceland’s Minister of Social Affairs, Pall Petursson and his delegation visited in May 2003.

• Dr. Paul H.T. Thorlakson Gallery in the Iceland Reading Room featured, from October 2003-February 2004, an exhibition of paintings by Louise Jonasson entitled “Untitled”, mounted in conjunction with the University of Manitoba/University of Iceland exchange agreement conference.

• The Libraries Exhibits Committee created two exhibits, Pysanky: Ukrainian Easter Eggs, as part of the launch of the Archives of the Ukrainian Experience in April 2003, and a beautiful photographic exhibit to complement the University of Manitoba journal, Mosaic’s, Photography Conference in March 2004.

Neil John Mclean Health Sciences Library (NJMHSL)

• As part of the agreement between the University of Manitoba and the Department of Health and Social Services for Nunavut, the J.A. Hildes Northern Medical Unit provides medical services to the eight communities in the Kivalliq Region of Nunavut. Part of these services include the provision of library services by NJMHSL to support the health and social services staff working in the Kivalliq Region. In 2003-2004, NJMHSL delivered 77 documents, conducted 19 literature searches, and sent 24 titles.

St. John’s College Library

• Library staff mounted two exhibits/displays during 2003-2004, one dealing with the life and work of the recently appointed Archbishop of Canterbury, Rowan Williams, and the other with the life and works of Carol Shields.

Information Literacy

• The Coordinator was invited to present a paper at the NordInfoLit Conference in Akureyi, Iceland in September 2003.
6. STATISTICAL SUMMARY AND COMMENTARY

6.1 Bibliographic Control

Statistics (summarized here) indicate the overall volume of work completed in Bibliographic Control rose over last year.

<table>
<thead>
<tr>
<th>Category</th>
<th>Monographs</th>
<th>Serials</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Titles catalogued/corrected/added to:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003-2004</td>
<td>65,576</td>
<td>21,334</td>
<td>86,910</td>
</tr>
<tr>
<td>2002-2003</td>
<td>61,701</td>
<td>28,769</td>
<td>90,470</td>
</tr>
<tr>
<td>Original Cataloguing:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003-2004</td>
<td>1,085</td>
<td>653</td>
<td>1,738</td>
</tr>
<tr>
<td>2002-2003</td>
<td>1,255</td>
<td>1,759</td>
<td>3,014</td>
</tr>
<tr>
<td>Internet Resources catalogued:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003-2004</td>
<td>1,667</td>
<td>1,886</td>
<td>3,553</td>
</tr>
<tr>
<td>2002-2003</td>
<td>600</td>
<td>4,268</td>
<td>4,868</td>
</tr>
<tr>
<td>Changed / added to: 2003-2004</td>
<td></td>
<td></td>
<td>447</td>
</tr>
<tr>
<td>2002-2003</td>
<td></td>
<td></td>
<td>2052</td>
</tr>
</tbody>
</table>

Two staff from bibliographic control moved on site to the Music Library in early May 2003 where they participated in a major cleanup project adding new catalogue records for 67 titles; recatalogued another 99 titles; and made major corrections to another 237 records already in BISON.

Bibliographic Control provided access to some of the large microforms sets housed in Dafoe, but not represented by title in BISON. Four large sets of OCLC WorldCat MARC records were purchased: American Culture, Series I and II, Adelaide Nutting History of Nursing Collection, and Fowler Collection of Architectural Books.

6.2 Public Service in Unit Libraries

The libraries maintain comprehensive statistical information on the activities in each library.

The Libraries have been recording public services statistics as indicators of activity and a 6-year chart included in Appendix 3 shows a number of interesting trends. While in 2003-2004 the total number of items circulated (print) is declining (14%), the number of visits are registered by turnstile count continues to increase (7%). This increase, along with huge increases in the use of electronic resources (electronic reserves materials 66%, hits on the Libraries web site 90%) suggests that students are making extraordinary use of the new media. Three charts show this remarkable upsurge. This trend is evident in all research libraries. While it is possible to access all electronic resources remotely many users prefer to visit the Libraries. The Libraries continues to have a strong role as “place” in the lives of students, faculty and staff.
7. OPERATIONS AND PLANNING

Operations and Planning is comprised of: 1) Administrative Services which includes Financial Resources, Human Resources, Statistics, and Physical Resources, and 2) Organizational Development which includes Staff Learning and Development and Strategic Planning.

7.1 Administrative Services

7.1.1 Human Resources

The Libraries employs 285 staff comprised of 55 full-time librarians, 150 full-time support staff, and 80 hourly-paid staff.

Recruitment and employment activities continue at a high rate during the past year with the successful completion of 43 full and part-time support staff searches, 3 full-time UMFA librarian searches, and 4 part-time CUPE librarian searches.

Labour relations activities included two grievances resulting from disciplinary action; one support and one academic. The support staff grievance went to arbitration. Both ended in settlement.

Performance planning and review continued as usual for support staff while a new system was implemented for librarians. We are currently in the process of evaluating the newly implemented system for librarians and will be reviewing the support staff system in relation to its focus on customer service skills and behaviours.

Four academic promotions for this year were: Jan Horner, promoted to Librarian, and Mora Gregg, Muriel St. John, and Mark Rabnett, promoted to Associate Librarian.

Three Librarians on Research/Study Leave were: Lyle Ford, Liv Valmstead, and Carole Cook.

7.1.2 Financial Resources Management

The addition of $150,000 budget-only funding to the operating budget for technology, has allowed for the maintenance of our sizable technology infrastructure. The mid-year transfer of $144,000 budget-only funding for casual wages allowed the Libraries to respond to our users’ request for extended hours of opening. We have used the much needed $375,000 Indirect Cost of Research funding to support the increased demand for document delivery services, our outsourced cataloguing contract, and acquisitions. The $400,000 budget-only increase to acquisitions prevented the need for extensive serials cancellations.
7.1.3  **Physical Resource Management**

Facilities maintenance and improvement activities throughout the year include the coordination of the following projects:

- Relocation of storage space in rooms 119/120 Engineering
- Law Library expansion project
- St. John’s Library asbestos abatement and ceiling repair
- Archives “fencing” in compliance with National Archives accreditation
- Staff security – panic button installation in each library
- Resource Management renovations at Neil John Mclean Health Sciences Library
- Purchase and installation of 3M Security Gates in Sciences and Technology Library
- Purchase and installation of five book check desensitizers
- Purchase and installation of ergonomic workstations in Bibliographic Control
- Prepare and set up for special events such as the Ukrainian Archives Opening, Dafoe 50th Anniversary Celebration, and the Libraries Book Sale
- Reassignment of Copier Services storage space to Archives

7.1.4  **Statistics Collection and Reporting**

The recording and reporting of Library usage statistics is a requirement of our institutional membership in ARL and CARL. We began reviewing and clarifying our process for statistical information collection. We also provided on-line internal access to the system-wide statistics and have begun to develop a comprehensive internal report that will contain some comparative analysis.

An administrative database containing information on all Libraries staff was developed using Access. Administrative Services staff have received training in order to query and create reports as required.

7.2  **Organizational Development**

7.2.1  **Staff Learning and Development**

Customer Service Needs Assessment: Four Learning Organization Matrix meetings were held for all interested staff to determine Libraries customer service needs. The needs assessment report is attached in Appendix 5.

Learning Styles Workshops: Three workshops were held for all interested staff to determine their personal learning style.

All Staff Meetings: Two meetings were held. The fall meeting was comprised of a presentation in the LibQUAL+ survey and Long-Service Employee Recognition. The spring meeting launched the Customer Service Training Calendar with a presentation by Dean Jerry Gray on customer service.
7.2.2 Strategic Planning

Building for a Bright Future Strategic Priorities Retreat: At this one day retreat attended by a cross-section of 40 staff, the University’s Five Strategic Priorities were reviewed. Libraries goals were developed which focused on how the Libraries can support the Universities strategic priorities. The data and goals resulting from the retreat are attached. Appendix 2.

UM Libraries Strategic Framework Retreat: At this day-long retreat, a cross-section of 40 Libraries staff reviewed a draft strategic framework which was developed from our current strategic plan, Agenda for Tomorrow 2002-2005, and our most recent resource planning submission. Some revision to the framework will take place as a result of the retreat and the framework will then be used as a basis for the development of our next strategic plan.
8. FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT (FIPPA) AND PERSONAL HEALTH INFORMATION ACT (PHIA)

There were 30 Access requests, eight complaints, and 1328 administrative questions and problems directed to the FIPPA/PHIA Coordinator’s office. Approximately 20 meetings were held with various groups and offices around campus. Many issues were explored, including the BANNER System, the Federal Health Consent form, PHIA databases, Pharmacy/MILE, the Alumni Association and PIPEDA. Fourteen consultations were completed, policy 614 was rewritten, and the PHIA policy is almost complete. Three information sheets were issued and reports were prepared, particularly for the Provincial Archives’ FIPPA Office. The sub-unit liaison network was created, and the first parts of a FIPPA/PHIA Manual were prepared, printed and delivered to these sub-unit liaisons. Twenty-nine Statement of Purpose were composed, 17 contracts were reviewed, revised, and written, six new forms were created and/or adapted.

The FIPPA Annual report for the Provincial Ombudsman regarding Access requests was prepared and a complaint regarding the disclosure of personal information to UMI/ProQuest led the National Library of Canada to change its procedures for handling student theses.
9. CONCLUSION

Much of the activity and progress in the Libraries during 2003-2004 was propelled and guided by the goals, outcomes and strategies of the strategic plan, *Agenda for Tomorrow 2001-2004*. The objective is to support the University’s teaching and research agenda by developing the collections, both print and electronic, and providing access to the collections through technology and services in all of the libraries.

As research libraries move toward the digital environment, providing the best in electronic resources that the budget will allow, while supporting maintenance of the print collection, has become an ever increasing challenge for the Libraries. With continued support from the University and the dedication of the Libraries staff, we will meet this challenge.

September 2004
### APPENDIX 1

**Libraries response to LibQual+ survey results**

<table>
<thead>
<tr>
<th>You Asked for It . . . .</th>
<th>We Did It!</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Extended library hours</strong></td>
<td>Thanks to additional funding from University Administration evening and weekend hours have been extended in the 2003/2004 academic term in most units.</td>
</tr>
</tbody>
</table>
| **Easier access to electronic and print articles** | Look for ![ UM Links ](image) in many of our databases. Click on the button to:  
  - link directly to online journals  
  - find out if the library holds a print copy of a journal article  
  - make a document delivery request |
| **New library computers** | All library computers will be upgraded by July 2004. |
| **Faster computers** | Several libraries are in the process of being rewired to improve network access. |
| **Better photocopiers** | Photocopiers will be upgraded in most units. |
| **More reliable equipment** | Pay-for-printing stations and the pay-for-printing server are being upgraded. |
| **Easier access to library electronic resources from off-campus** | EZProxy makes it possible to access all library resources by entering the number from a staff or student card and four-digit PIN. |
| **Customer service** | Additional staff training will be provided on computer technical skills and customer service.  
  - “Chat Help,” a live virtual reference service implemented in November 2003, lets you chat online with a library staff when you need help.  
  - Extended hours for our Libraries’ Electronic Technologies and Services Help Desk allows you to get more assistance with problems related to connecting to online resources. |
| **More online journals** | Over 2500 new ejournals were added in 2003. |
## GOALS SUMMARY

<table>
<thead>
<tr>
<th>Libraries Planning Retreat 2003</th>
<th>Access to Exceptional Education</th>
<th>Attract &amp; Retain the Best</th>
<th>Difference as Centre for Research &amp; Graduate Education</th>
<th>Provide Human, Physical &amp; Technical Infrastructure</th>
<th>Be at Centre of Community: On Manitoba</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection Building and Access Services</td>
<td>➤ Further strengthen our information literacy program</td>
<td>➤ Innovative in rationalization of collection</td>
<td>➤ Address collection weaknesses</td>
<td>➤ Identify our relationship with the SmartPark and develop collection and service policies appropriately</td>
<td>➤ Identify our relationship with the SmartPark and develop collection and service policies appropriately</td>
</tr>
<tr>
<td></td>
<td>➤ Expand resources staff for Orientations Information Literacy</td>
<td></td>
<td>➤ Promotion of library services to Faculty and Grad students</td>
<td>➤ Review what services are available (some are, some aren’t)</td>
<td>➤ Review what services are available (some are, some aren’t)</td>
</tr>
<tr>
<td></td>
<td>➤ Improve access to information through staff training, better technologies and better collections</td>
<td></td>
<td>➤ Implement more tools for surveying needs of grad students</td>
<td>➤ Open more services to free external borrowers (e.g., Alumni and Con Ed), expand access to cards</td>
<td>➤ Open more services to free external borrowers (e.g., Alumni and Con Ed), expand access to cards</td>
</tr>
<tr>
<td></td>
<td>➤ Review policies to remove bureaucratic hurdles to facilitate access to Exceptional Education</td>
<td></td>
<td>➤ Promote current services (e.g., free document delivery)</td>
<td>➤ Give more external ‘on-line’ access (e.g., Con Ed, targeted groups, etc.)</td>
<td>➤ Give more external ‘on-line’ access (e.g., Con Ed, targeted groups, etc.)</td>
</tr>
<tr>
<td></td>
<td>➤ Get the most out of our resources; set strategic student goals</td>
<td></td>
<td>➤ Correct with new Faculty to improve resources and services for them</td>
<td>➤ Use and promote specialized collections better (e.g., Archives, Icelandic)</td>
<td>➤ Use and promote specialized collections better (e.g., Archives, Icelandic)</td>
</tr>
<tr>
<td></td>
<td>➤ Identify areas where a team approach would further the goals of collection management and bibliographic instruction</td>
<td></td>
<td>➤ Continue to develop collection strengths</td>
<td>➤ Increase donor (money) program</td>
<td>➤ Increase donor (money) program</td>
</tr>
<tr>
<td></td>
<td>➤ Position Libraries to remain current with developing inter-disciplinary fields of study</td>
<td></td>
<td>➤ Improve results of LibQual+ survey</td>
<td>➤ Look at special services for alumni (130,000 members)</td>
<td>➤ Look at special services for alumni (130,000 members)</td>
</tr>
<tr>
<td></td>
<td>➤ Identify lacking collections – fix and improve</td>
<td></td>
<td>➤ Develop a plan to identify and to allocate collection money to new endeavours/areas</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### GOALS SUMMARY

<table>
<thead>
<tr>
<th>Access to Exceptional Education</th>
<th>Attract &amp; Retain the Best</th>
<th>Diffrence as Centre for Research &amp; Graduate Education</th>
<th>Provide Human, Physical &amp; Technical Infrastructure</th>
<th>Be at Centre of Community: On Manitoba</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Develop and increase or improve customer service approach</td>
<td>➢ Revise Librarians' Council report</td>
<td>➢ Librarians to be more active members of professional associations</td>
<td>➢ Staff need training in new technology</td>
<td>➢ Try to recruit groups such as (Aboriginal) to library staff</td>
</tr>
<tr>
<td>➢ Provide staff development for casual staff</td>
<td>➢ Provide meaningful and practical release time</td>
<td>➢ Extend mechanism for library staff research opportunities to support staff</td>
<td>➢ Create staff training programs for technology</td>
<td>➢ Greater inclusivity in hiring</td>
</tr>
<tr>
<td>➢ Staff is top priority</td>
<td>➢ Better funding = better staffing levels and conditions</td>
<td>➢ Implement the recruitment and retention report</td>
<td>➢ Determine student and Faculty needs, and focus efforts there and on objectives of University</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Better benefits (e.g., free gym)</td>
<td>➢ Set up partnership with RRC technician program (requires ASES changes)</td>
<td>➢ Allow staff time to do research</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Develop the context of the mentor program (guidelines, etc.); structure mentoring system and make available to support staff; implement retention and recruitment recommendations</td>
<td>➢ Investigate reasons why more internal staff do not apply for more responsible positions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Strong commitment to staff development with a strong program in place</td>
<td>➢ Staff Recognition Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Gradual retirement and training</td>
<td>➢ Implement partnerships with Library Schools Co-op Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Facilitate Library Tech Training for support staff; Co-op RRC program</td>
<td>➢ Free flu shots</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Implement the recruitment and retention report</td>
<td>➢ Contract with support staff to take MLIS and guarantee job when complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>➢ On-site staff learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>➢ Take advantage of local talent knowledge to teach Library skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOALS SUMMARY</td>
<td>LIBRARIES PLANNING RETREAT 2003</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to Exceptional Education</td>
<td>Be at Centre of Community: On Manitoba</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attract &amp; Retain the Best</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Difference as Centre for Research &amp; Graduate Education</td>
<td>Resources need to be more available perhaps via virtual reference</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Acquire funds to purchase technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Partner with IST to fix network problems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Determine student and Faculty needs, and focus efforts there and on objectives of University</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Keep technology up to date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Promote tech infrastructure and skill sets that we already have</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Increase digitization of our special collections so they can be received online</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology Maintenance and Renewal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Upgrade technology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Better resources – computers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Digitize more unique collections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Resources need to be more available perhaps via virtual reference</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Acquire funds to purchase technology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Partner with IST to fix network problems</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Determine student and Faculty needs, and focus efforts there and on objectives of University</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Keep technology up to date</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Promote tech infrastructure and skill sets that we already have</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Increase digitization of our special collections so they can be received online</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilities Planning and Renewal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Improve the students' comfort zone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Signage, simplify language for users</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Improve physical environments; change, model virtual environments, make more welcoming and staff areas attractive and large enough</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Provide support to entice University for infrastructure improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Storage and stack space, need backup plan if no facility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Develop a plan for facility renewal (e.g., Defoe, NIMH, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Secure a remote storage facility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Libraries Cafe</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Need to search for increased funding (government/private)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Better resources – offices, working environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Remote site storage, first step to improving the Libraries physical environment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Engage professional designers for our physical and web space</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Establish basic standards for staff workplace</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Need remote site storage facility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Implement plan for continuous facility renewal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Determine student and Faculty needs, and focus efforts there and on objectives of University</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Re-examine and possibly re-design physical space</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Ensure parking availability for Libraries events: lecture series, etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## GOALS SUMMARY

<table>
<thead>
<tr>
<th>Access to Exceptional Education</th>
<th>Attract &amp; Retain the Best</th>
<th>Difference as Centre for Research &amp; Graduate Education</th>
<th>Provide Human, Physical &amp; Technical Infrastructure</th>
<th>Be at Centre of Community: On Manitoba</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make libraries a hub for multiple community activities: learning, interacting/teaching, meeting socially.</td>
<td>Partnering with Faculty</td>
<td>Develop a more cohesive UML strategy for Aboriginal students</td>
<td>Lobby for the completion of the Campus Plan – this has a public access component.</td>
<td></td>
</tr>
<tr>
<td>Market library to students who think everything is on the internet.</td>
<td>A marketing program – corporate identity</td>
<td>Continue to develop relationship with CHET program</td>
<td>Raise profile of Libraries in the community.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grad education, bring bibliographers into IL program</td>
<td>Communicate services are open to public.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Participate freely in university's recruitment and retention of Aboriginal students</td>
<td>Open more services to free external borrowers (e.g., Alumni and Con Ed), expand access to cards.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Publicize library staff research as well as services throughout the University community</td>
<td>Implement corporate information service for private business.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Examine programs that we can be a leader in (e.g., Healthcare)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bring together resources such as Aboriginal research at UML.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Take advantage of current events and promote lecture series, speakers, etc. on issues and events (e.g., bioengineers)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Increase donor (money) program</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Look at special services for alumni (130,000 members)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Hold more public events. Facilities could hold events in library (or maybe public).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Food for Thought” in the UML.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Service other facets of the corporate domain (as well as lawyers/doctors).</td>
<td></td>
</tr>
</tbody>
</table>

Libraries Planning Retreat - Breezy Bend Country Club  
October 30, 2003  
Prepared by Learning and Development Services
## PRIORITY 1: Providing Access to Exceptional Education

<table>
<thead>
<tr>
<th><strong>Collection Building and Access Services</strong></th>
<th><strong>Meaning</strong></th>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
<th><strong>Goals</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing access to exceptional information</td>
<td>Some of our collections are strong</td>
<td>Some collections lacking; need money to enhance</td>
<td>Further strengthen our Information Literacy program</td>
<td></td>
</tr>
<tr>
<td>Sufficiently funded to support student needs and curriculum, especially graduate programs</td>
<td>We are the reality check on the viability of programs offered through our course assessment statements</td>
<td>Not spending enough on monographs</td>
<td>Expand resources staff for orientations Information Literacy</td>
<td></td>
</tr>
<tr>
<td>Account for those collections that need to be updated and supported. Better allocation of funds within the libraries to support those collections documented to be insufficient</td>
<td>Everybody responsible for collection development, be more of a specialist and purchase what we need</td>
<td>Doing the assessments quickly enough to address the curriculum changes the faculties want to meet current needs</td>
<td>Improve access to information through staff training, better technologies and better collections</td>
<td></td>
</tr>
<tr>
<td>Work more closely with faculties</td>
<td>Areas of excellence in the collection – Need to identify, support and promote them (e.g., Canadian Studies, Aboriginal Health, Icelandic)</td>
<td>Building and maintaining collections to support undergrad programs</td>
<td>Review policies to remove bureaucratic hurdles to facilitate access to Exceptional Education</td>
<td></td>
</tr>
<tr>
<td>Need exceptional resources compared to other Universities; meaning need more funding</td>
<td></td>
<td></td>
<td>Get the most out of our resources; set strategic student goals</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Identify areas where a team approach would further goals of collection management and bibliographic instruction</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Position Libraries to remain current with developing inter-disciplinary fields of study</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Identify lacking collections – fix and improve</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Build and maintain collection to support undergrad and graduate programs</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Change collections development from historical way</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Work more closely with Faculty to upgrade collections</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>More LibQual for knowing the students’ needs</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Need to search for increased funding (government/private)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Change public minds</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Make access to materials from different units move seamless and quicker</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Increase hours of access</td>
<td></td>
</tr>
<tr>
<td><strong>PRIORITY 1: Providing Access to Exceptional Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Meaning</strong></th>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
<th><strong>Goals</strong></th>
</tr>
</thead>
</table>
| **Staff Recruitment, Development and Retention** | ➢ Celebrate excellence is what library staff are doing  
 ➢ Staff training re: customer focus  
 ➢ Match students', staffs' technology skills  
 ➢ Library Atmosphere – we have the staff with the positive attitudes, skills, training and support to do their jobs. | ➢ Staff are good at making students feel welcome  
 ➢ Our decentralized system is enabling us to develop staff subject expertise and library technical training even at the entry level  
 ➢ Our staff is recognized by the students as being friendly and helpful  
 ➢ A good core of staff that have the will to do what it takes to hone access to exceptional education  
 ➢ People are exceptional, staff is a strength, create a good environment – attitude of staff is good – need this  
 ➢ Staff training  
 ➢ Currently have info literacy coordinator  
 ➢ Subject bibliographers are knowledgeable  
 ➢ Staff provides quality electronic resources | ➢ Staff training to help people keep up  
 ➢ Increasing skills of public service staff  
 ➢ Casual staff to be equal to full time  
 ➢ Develop a plan for Faculty renewal  
 ➢ Surveys have indicated that students do appreciate the helpful staff  
 ➢ Development and increase customer service and client based service  
 ➢ Move to increased hours of operation as best as possible | ➢ Develop and increase or improve customer service approach  
 ➢ Provide staff development for casual staff  
 ➢ Staff is top priority |

| **Technology Maintenance and Renewal** | ➢ Move to wireless environment | ➢ Sometimes our computer services do not match what is available outside in the University  
 ➢ More staff equipment – reliability of technology needs to be better  
 ➢ University wide problem  
 ➢ Lack of technological resources | ➢ Upgrade technology |
<table>
<thead>
<tr>
<th>Facilities Planning and Renewal</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Libraries need to be attractive – Dafoe “looks like a bunker. Feel oppresed in there”</td>
<td>Some of the libraries are physically attractive</td>
<td>Finances, funding/ resources</td>
<td>Improve the students’ comfort zone</td>
</tr>
<tr>
<td>NUJM is light and welcoming.</td>
<td>Libraries are the choice for students to meet and study in:</td>
<td>Study space (need study rooms–group and private)</td>
<td>Signage; simplify language for users</td>
</tr>
<tr>
<td>Physical environment is important.</td>
<td>Have limited group study areas</td>
<td>Challenge is to create a warm and welcoming environment to study in</td>
<td>Improve physical environments; change; model virtual environments, make more welcoming and staff areas attractive and large enough</td>
</tr>
<tr>
<td>Feel comfortable – Remove barriers</td>
<td></td>
<td>Challenge to build remote site storage facility</td>
<td>Provide support to entice University for infrastructure improvements</td>
</tr>
<tr>
<td>Orientation</td>
<td></td>
<td>Crumbling physical infrastructure</td>
<td>Storage and stack space, need back up plan if no facility</td>
</tr>
<tr>
<td>More inviting</td>
<td></td>
<td></td>
<td>Develop a plan for facility renewal (e.g., Dafoe, NUJMHS, etc.)</td>
</tr>
<tr>
<td>Signage – simplify</td>
<td></td>
<td></td>
<td>Secure a remote storage facility</td>
</tr>
<tr>
<td>Create group study spaces</td>
<td></td>
<td></td>
<td>Libraries Cafe</td>
</tr>
<tr>
<td>Flexible/comfortable seating</td>
<td></td>
<td></td>
<td>Need to search for increased funding (government/private)</td>
</tr>
<tr>
<td>Foster an atmosphere, physical space for students to study and study together.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Outreach to the Community**

- New programs - info literacy is an example – creates more interaction with faculty and visibility.
- Removing some of the hurdles we have created for students, but which are currently in place – bureaucratic hurdles like Distance Ed students face delays in getting their student cards and therefore service.
- The libraries provide access to an exceptional education and access to the collection what we already have and what we will have in the future.

- Online services are a strength (13,000 URL)
- Many services are strengths, (virtual reference)

- Make libraries a hub for multiple community activities: learning, interacting/teaching, meeting socially
- Market library to students who think everything is on the internet
<table>
<thead>
<tr>
<th>Collection Building and Access Services</th>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students, faculty, and library staff</td>
<td>Faculty – level of support we can provide to specialized programs</td>
<td>Recruitment and retention plan, mentoring for Academic Librarians</td>
<td>Better use of RRC technician program</td>
<td>Innovative in rationalization of collection</td>
</tr>
<tr>
<td>Opportunity to enhance expertise and service</td>
<td>Students – access to collections and training to increase awareness</td>
<td>Support for staff development – Staff Development Committee</td>
<td>Implementation of recruitment and retention report</td>
<td></td>
</tr>
<tr>
<td>Right staff with right stuff – skills: adaptable, flexible, service attitude, oriented to learning, keep up knowledge and experience</td>
<td>Growing shortage of librarians/archivists</td>
<td>Good-HR practices – up-to-date job descriptions</td>
<td>Improvement of mentor program</td>
<td></td>
</tr>
<tr>
<td>Levels for better service delivery</td>
<td>Promote qualified staff from within</td>
<td>Hire people who are a good match</td>
<td>Maclean’s report</td>
<td></td>
</tr>
<tr>
<td>Identify and reward excellent staff – training, compensation, growth/promotion, mentorship</td>
<td>Burnout, ‘doing more with less’ syndrome</td>
<td>Matching skills to job descriptions, change jobs, opportunity for specialization</td>
<td>UoM Culture – introversion?</td>
<td></td>
</tr>
<tr>
<td>Revisit Librarians’ Council report</td>
<td>How do you motivate/provide incentives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide meaningful and practical release time</td>
<td>No management training</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better funding = better staffing levels and conditions</td>
<td>High expectations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop the context of the mentor program (guidelines, etc.); structure mentoring system and make available to support staff, implement retention and recruitment recommendations</td>
<td>How much time for research</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strong commitment to staff development with a strong program in place</td>
<td>Lack of resources for staff development, financial, release time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gradual retirement and training</td>
<td>Targeted staff development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilitate Library Tech Training for support staff, Co-op RRC program</td>
<td>Support staff with formal Library training – Library tech</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set up partnership with RRC technician program (requires AESES changes)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investigate reasons why more internal staff do not apply for more responsible positions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff Recognition Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement partnerships with Library Schools Co-op Program</td>
<td>Free flu shots</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free flu shots</td>
<td>Contract with support staff to take MLIS and guarantee job when complete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract with support staff to take MLIS and guarantee job when complete</td>
<td>On-site staff learning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On-site staff learning</td>
<td>Take advantage of local talent knowledge to teach Library skills</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Libraries Planning Retreat 2003

**Priority 2: Attract and Retain the Best**

<table>
<thead>
<tr>
<th></th>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td></td>
<td></td>
<td>Better resources – computers</td>
<td></td>
</tr>
<tr>
<td>Maintenance and</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilities Planning</td>
<td></td>
<td></td>
<td>Better resources – computers</td>
<td></td>
</tr>
<tr>
<td>and Renewal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outreach to the</td>
<td></td>
<td></td>
<td>Better resources – computers</td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reputation of Winnipeg location
- Improved physical workspaces
- Establish basic standards for staff workspace
- Remote site storage, first step to improving the Libraries physical environment
- Engage professional designers for our physical and web space
- Establish basic standards for staff workplace

- Reputation nationally
- Perceptions of location
- Promotion availability
**Libraries Planning Retreat 2003**

**PRIORITY 3: Be the Center for Research and Graduate Education that Makes a Difference to our Province, our Nation and our World**

<table>
<thead>
<tr>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
</table>
| **Collection Building and Access Services** | - STM's have increased the number of periodicals  
- Free document delivery  
- More public access  
- NJM - house calls; librarians go to the offices of students and staff  
- CISTI Source table of contents  
- University has mechanism in place for academic staff research  
- Info literacy program  
- Support for archival program; unique resources  
- Bibliographers - collections and IL  
- Collection assessment ability; data-based; not subjective  
- Encoded archival description finding aids online  
- Teaching IL skills to CHET program students  
- Unique resources in archives  
- Librarians provide mentoring to grad students  
- Aboriginal health collection  
- Role in graduate program review  
- CULSP commitment | - Grad students where English is not their first language  
- Difficult to add new services  
- Further development of Info literacy courses  
- To keep up collections to support graduate level research  
- LibQual+ report; higher levels of grad student dissatisfaction  
- Funding  
- Libraries strategy re: aboriginal students - aboriginal health collections and archives for aboriginals  
- Develop collection to meet graduate program reviews | - Address collection weaknesses  
- Promotion of library services to Faculty and Grad students  
- Implement more tools for surveying needs of grad students  
- Promote current services (e.g., free document delivery)  
- Connect with new Faculty to improve resources and services for them  
- Continue to develop collection strengths  
- Improve results of LibQual+ survey  
- Develop a plan to identify and to allocate collection money to new endeavours/areas  
- Build on Dafoe Graduate Lecture Series  
- Develop collections to fully support graduate level research  
- Develop a more intensive version of Info literacy program for both grad students and faculty  
- Develop orientation courses specific to Aboriginal students and built around research areas of interest to them (e.g., current events, Native fights) |

| **Staff Recruitment, Development and Retention** | - Have staff that would be able to train at that level  
- Support and encourage the generation of research among libraries staff  
- Supporting a university for aboriginal needs, (e.g., hiring individuals of aboriginal heritage)  
- Academic staff with advanced degrees  
- Identifying areas of specialization – unknown to staff | - Staff help grad students  
- Highly diversified staff in place already | - Library staff to graduate student ratio should be higher  
- Workload is overwhelming  
- Need more high level support staff  
- Support for all staff to pursue research and educational interests  
- Recruit graduates of aboriginal ancestry | - Librarians to be more active members of professional associations  
- Extend mechanism for library staff research opportunities to support staff |

---

Libraries Planning Retreat - Breezy Bend Country Club  
October 30, 2003  
Prepared by Learning and Development Services
PRIORITY 3: Be the Center for Research and Graduate Education that Makes a Difference to our Province, our Nation and our World

<table>
<thead>
<tr>
<th>Libraries Planning Retreat 2003</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meaning</strong></td>
</tr>
<tr>
<td>Technology Maintenance and Renewal</td>
</tr>
<tr>
<td>Facilities Planning and Renewal</td>
</tr>
<tr>
<td>Outreach to the Community</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Libraries Planning Retreat 2003</td>
</tr>
<tr>
<td>--------------------------------</td>
</tr>
</tbody>
</table>

**PRIORITY 4: Provide the Human, Physical and Technological Infrastructure Necessary for Learning and Research**

<table>
<thead>
<tr>
<th>Collection Building and Access Services</th>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Recruitment, Development and Retention</td>
<td>Getting the right people conducive to learning and research</td>
<td>Knowledgeable, Dedicated, Adaptable, Deep technical skills, Helpful, committed, Extra-mile, Strong competent, Creative, New staff with new ideas, Staff development program, Training sessions, Leader in resources and staff programs, Retention and recruitment plan</td>
<td>Government policies (re. University and funding), Retaining staff, Concerning interests, Finding staff with subject expertise, Lack of staff development to keep up with changes, Getting people to come to Winnipeg, Difficult to get staff to want to change, Working within collective agreements, Getting diverse groups to work together, Older staff beginning to retire – need succession strategies, quicker recruitment</td>
<td>Staff need training in new technology, Create staff training programs for technology, Determine student and Faculty needs, and focus efforts there and on objectives of University, Allow staff time to do research</td>
</tr>
</tbody>
</table>

| Technology Maintenance and Renewal | Getting the right technology conducive to learning and research | LETS – huge bonus, great service, Technology Plan, SFX, Upgrading possible with limited resources, Good relationship with IST, Good leadership for technology programs, E-resources, virtual reference (available remotely), Delivery of technology-based training in classroom Info-Lit, Successful in obtaining outside funding for new facilities, equipment, initiatives, Supportive professional library environment (e.g., CARL, ARL) | Infrastructure on verge of collapse, Funding needed to keep up with ever changing technology, No training for new technology, Central IT group not responsive or flexible | Resources need to be more available perhaps via virtual reference, Acquire funds to purchase technology, Partner with IST to fix network problems, Determine student and Faculty needs, and focus efforts there and on objectives of University, Keep technology up to date, Promote tech infrastructure and skill sets that we already have |

---

Libraries Planning Retreat - Breezy Bend Country Club  
October 30, 2003  
Prepared by Learning and Development Services
# Libraries Planning Retreat 2003

## PRIORITY 4: Provide the Human, Physical and Technological Infrastructure Necessary for Learning and Research

<table>
<thead>
<tr>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
</table>
| Facilities Planning and Renewal | ➢ Getting the best environment conducive to learning and research  
➢ Financial resources  
➢ Make the physical space more welcoming and safe (space more non-intimidating)  
➢ Ensure the infrastructure is sustainable | ➢ Rewiring of libraries  
➢ Computer labs in most units  
➢ Provide models for future renovations (law library, agriculture, NIM, CMAD, Iceland)  
➢ Progress in spite of limited resources  
➢ Good at needs assessment  
➢ Well-identified priorities  
➢ Decentralized facilities allows us to be adaptable | ➢ Provide more comfortable work/study space  
➢ Little upkeep of older buildings  
➢ Band-aid fixes  
➢ No budget for infrastructure  
➢ Integrating renewal of new technology in older buildings  
➢ Competition for priorities when allocating space  
➢ “We’re full” – need storage  
➢ Need major equipment overhaul  
➢ Money needed for emergencies  
➢ Better signage  
➢ IST cannot keep up with libraries’ needs | ➢ Need remote site storage facility  
➢ Implement plan for continuous facility renewal  
➢ Determine student and Faculty needs, and focus efforts there and on objectives of University  
➢ Re-examine and possibly re-design physical space |

| Outreach to the Community | | | |
### LIBRARIES PLANNING RETREAT 2003

**PRIORITY 5: Be at the Center of our Community: On Manitoba**

<table>
<thead>
<tr>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collection Building and Access Services</strong></td>
<td>We must have services and resources in place to support Aboriginal Studies programs</td>
<td>Icelandic collection, Tribune collection, archives, Aboriginal collection, Distance Education Programs, (rebuilding), We have the expertise and collections to support, We are a repository library for the Canadian Government publications which is open to the public, Public can use our facilities on site and also can borrow at a nominal fee, We have the ethnic collections: Slavic, Icelandic and the Librarians with the language skills, The Aboriginal Health Collection and the Consumer Health Collection are open to the public, Law Doc and Info Ref are available to lawyers and doctors, Consumer health collection provides a model for external users</td>
<td>Licensing prohibits open access, Relationship to Smart Parks, Fee for external borrowers' cards, Balancing our resources between students, faculty and the public (High school students), Access to wider public databases limited resources, Can we develop a new model of an academic library as a community resource, Have balance between student use and community use, Not enough resources to accommodate large number of external visitors or users with special access</td>
</tr>
</tbody>
</table>

<p>| <strong>Staff Recruitment, Development and Retention</strong> | Recruit widely | We have the expertise and collections to support | Try to recruit groups such as (Aboriginal) to library staff, Greater industry in hiring |
| <strong>Technology Maintenance and Renewal</strong> | We seek donor support (donor database) | | Increase digitization of our special collections so they can be accessed online |
| <strong>Facilities Planning and Renewal</strong> | | Parking for the general public | Ensure parking availability for Libraries events: lecture series, etc. |</p>
<table>
<thead>
<tr>
<th>Outreach to the Community</th>
<th>Meaning</th>
<th>Strengths</th>
<th>Challenges</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Is the only research library in Province (already at center)?</td>
<td>Are part of some community groups (Man Lib Consortium)</td>
<td>Playing different roles (community role vs. responsibility to us)</td>
<td>Lobby for the completion of the Campus Plan – this has a public access component</td>
</tr>
<tr>
<td></td>
<td>What about S. Boniface College?</td>
<td>We hold some public events (e.g., archives talks, Oralia, book sale)</td>
<td>Friends of Libraries is not strong</td>
<td>Raise profile of Libraries in the community</td>
</tr>
<tr>
<td></td>
<td>We need to determine our role in the community, fulfill that role and hope that leads to community support (money)</td>
<td>Some promotional efforts (e.g., Archives)</td>
<td>Promoting our resources to the public</td>
<td>Communicate services are open to public</td>
</tr>
<tr>
<td></td>
<td>Membership in Manitoba Library Consortium</td>
<td>Seen as leaders in some areas in the community</td>
<td>Identifying our role to the public</td>
<td>Open more services to free external borrowers (e.g., Alumni and Con Ed, expand access to cards</td>
</tr>
<tr>
<td></td>
<td>Provide services to others – general public, professional organizations</td>
<td>Promote “life long learning” by making services available to community</td>
<td>Establishing our role with industry – they will require corporate cards and research services, etc.</td>
<td>Possibly implement corporate information service for private business</td>
</tr>
<tr>
<td></td>
<td>Community unaware of our services, need to communicate</td>
<td>Have external borrowers</td>
<td>Can we develop a new model of an academic library as a community resource</td>
<td>Examine programs that we can be a leader in (e.g., Healthcare)</td>
</tr>
<tr>
<td></td>
<td>Should be connected to community – links to outside</td>
<td>Give tours to high school students from up north</td>
<td>Have balance between student use and community use</td>
<td>Bring together resources such as Aboriginal research at UML</td>
</tr>
<tr>
<td></td>
<td>Provide alumni with resources available to others</td>
<td>We are welcoming to genealogists</td>
<td></td>
<td>Take advantage of current events and promote lecture series, speakers, etc. on issues and events (e.g., biologists)</td>
</tr>
<tr>
<td></td>
<td>The libraries are a resource to support the University in its efforts to be responsive to serving the broader community</td>
<td>Lecture series are open to the public</td>
<td></td>
<td>Increase donor (money) program</td>
</tr>
<tr>
<td></td>
<td>Faculty can give background in their areas of expertise to the wider community</td>
<td></td>
<td></td>
<td>Look at special services for alumni (130,000 members)</td>
</tr>
<tr>
<td></td>
<td>Mandate to serve all of Province</td>
<td></td>
<td></td>
<td>Look at holding more public events. Maybe Faculties could hold events in library (or maybe public). “Food for Thought” in the UML</td>
</tr>
<tr>
<td></td>
<td>Open to everyone</td>
<td></td>
<td></td>
<td>Look at service to other facets of the corporate domain (as well as lawyers/doctor)</td>
</tr>
<tr>
<td></td>
<td>We have already provided training to many Manitobans and we need to reconnect</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>% Change</td>
<td>Overall %</td>
<td>% Change</td>
<td>Overall %</td>
</tr>
<tr>
<td>------------------</td>
<td>----------</td>
<td>-----------</td>
<td>----------</td>
<td>-----------</td>
</tr>
<tr>
<td><strong>Recorded Circulation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1999/00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>711,091</td>
<td>699,039</td>
<td>-2</td>
<td>538,523</td>
<td>-9</td>
</tr>
<tr>
<td><strong>Internal Use</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>504,886</td>
<td>469,624</td>
<td>-7</td>
<td>418,667</td>
<td>-11</td>
</tr>
<tr>
<td><strong>Total Circulation</strong></td>
<td>1,215,977</td>
<td>1,168,663</td>
<td>1,057,130</td>
<td>1,013,308</td>
</tr>
<tr>
<td><strong>Turnstile Count</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1,559,285</td>
<td>1,647,696</td>
<td>+5</td>
<td>1,506,476</td>
<td>-9</td>
</tr>
<tr>
<td><strong>Reference Questions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>75,299</td>
<td>77,699</td>
<td>+2</td>
<td>74,493</td>
<td>-8</td>
</tr>
<tr>
<td>External</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9,798</td>
<td>9,319</td>
<td>-5</td>
<td>6,454</td>
<td>-45</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>85,035</td>
<td>87,018</td>
<td>-2</td>
<td>83,947</td>
<td>-2</td>
</tr>
<tr>
<td><strong>Orientation &amp; Seminars</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sessions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1,064</td>
<td>866</td>
<td>-18</td>
<td>758</td>
<td>-12</td>
</tr>
<tr>
<td>Seminars</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>94</td>
<td>-51</td>
<td>143</td>
<td>+34</td>
</tr>
<tr>
<td><strong>Participants</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6,282</td>
<td>7,870</td>
<td>-20</td>
<td>7,145</td>
<td>-9</td>
</tr>
<tr>
<td>Seminars</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>303</td>
<td>855</td>
<td>+182</td>
<td>1,243</td>
<td>+31</td>
</tr>
<tr>
<td><strong>Contact Hours</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>36</td>
<td>+36</td>
<td>299</td>
<td>+38</td>
</tr>
<tr>
<td>Seminars</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>237</td>
<td>-42</td>
<td>200</td>
<td>-16</td>
</tr>
<tr>
<td><strong>Mail Loans to Individuals</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winnipeg</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>358</td>
<td>104</td>
<td>227</td>
<td>249</td>
</tr>
<tr>
<td>Photocopy</td>
<td>2,500</td>
<td>2,053</td>
<td>2,467</td>
<td>5,888</td>
</tr>
<tr>
<td>Other</td>
<td>84</td>
<td>438</td>
<td>103</td>
<td>73</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>1,783</td>
<td>1,723</td>
<td>1,783</td>
<td>2,172</td>
</tr>
<tr>
<td>Photocopy</td>
<td>3,192</td>
<td>3,562</td>
<td>3,043</td>
<td>2,724</td>
</tr>
<tr>
<td>Other</td>
<td>33</td>
<td>438</td>
<td>35</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>8,029</td>
<td>8,318</td>
<td>7,668</td>
<td>11,115</td>
</tr>
</tbody>
</table>
APPENDIX 3

UM Libraries Indicators of Activity

- **Turnstile Count**
  - 1998/99: 0
  - 1999/00: 100000
  - 2000/01: 120000
  - 2001/02: 100000
  - 2002/03: 80000
  - 2003/04: 60000

- **Circulation**
  - 1998/99: 0
  - 1999/00: 200000
  - 2000/01: 400000
  - 2001/02: 600000
  - 2002/03: 800000
  - 2003/04: 1000000

- **UML Website Usage**
  - 1998/99: 0.00
  - 1999/00: 5000000.00
  - 2000/01: 10000000.00
  - 2001/02: 15000000.00
  - 2002/03: 20000000.00
  - 2003/04: 25000000.00

- **Electronic Reserves**
  - 1998/99: 0.00
  - 1999/00: 20000.00
  - 2000/01: 40000.00
  - 2001/02: 60000.00
  - 2002/03: 80000.00
  - 2003/04: 100000.00
APPENDIX 4

New resources added to NETDOC during 2003/2004

Agricultural Engineering Abstracts  
Alternative Press Index  
American Film Scripts Online  
Année philologique  
Berkeley Electronic Press  
Biblio brancheé  
Bibliothèque des Lettres  
BioMed Central  
British Medical Journals  
Canadian Newsstand  
Canadian Research Index  
CanCorp Financials Professional  
Current Research @ University of Manitoba  
Data Metallogenica  
dekker.com  
Early Encounters in North America: Peoples, Cultures and the Environment  
Economist Intelligence Unit: Country Reports  
Early English Books Online (EEBO)  
EMBASE Complete  
Empire Online  
ENGnetBASE  
Environmental Sciences & Pollution Management  
Financial Post Investor Suite  
Globe and Mail  
images.MD  
Index of Christian Art  
International Financial Statistics  
JSTOR Arts & Sciences II  
JSTOR Arts & Sciences III  
JSTOR Arts & Sciences IV  
JSTOR Arts & Sciences Complement  
JSTOR Business Collection  
JSTOR Ecology & Botany  
LegalTrac  
LeisureTourism.com  
Nature Publishing Group  
NCJRS Abstracts Database (National Criminal Justice Reference Service)  
netLibrary  
OECD Health Data  
Palmer's Index to The Times  
PsycARTICLES  
Science Online  
Social Services Abstracts  
Textile Technology Index  
ulrichsweb.com  
UpToDate  
Virtual News Library  
Women's Studies International
APPENDIX 5

Libraries Customer Service Needs Assessment Analysis

April, 2004

Presented by the Staff Learning and Development Committee
Susan Hiedebrecht, Trudy Dyck, Mark O’Riley, Val Ward, Denise Reitsma, Debby Brown (Chair), Rosalyn Howard (Resource)

Introduction

The Staff Learning and Development Committee have engaged the Libraries staff in a process to assess our needs in the area of customer service training. During the period September 2003 to January 2004 a series of “matrix” meetings was held to gather input regarding the staff’s perception of;

1. What we are doing well
2. What factors in the workplace help us provide good customer service
3. What factors in the workplace hinder good customer service
4. Customer service practices we could improve through training

The data collected will be used to develop a training curriculum for staff with a focus on providing improved customer service to the students, faculty, and staff of the University of Manitoba Libraries.

Data Collection

Four “matrix meetings” were attended by a total of 45 staff member participants. Of the 45 participants, 13 were academic librarians, and 32 comprised a cross section of support staff from shlevers to library supervisors and technical and administrative staff. There were 34 female and 11 male participants.

The “matrix” interview process, a Learning Organization tool used for information gathering, was used to collect the data. The technique involves all participants in a process of working in groups of four, asking and answering a carefully chosen set of four questions. For this process the questions listed above were used. All participants were required to interview each of the three others in their group with regard to one of the above questions and respond to each of the other three questions. The responses to each question were then summarized by small groups and then discussed by the entire group.

Data Analysis

The data collected in each of the four matrix meetings was consolidated and analyzed by the Staff Learning and Development Committee. A discussion of the consolidated data follows:
What we are doing well

In general participants believed that libraries staff are well qualified, knowledgeable and skilled with a willingness to assist patrons. We offer a variety of valuable and leading-edge services and equipment in a harmonious work environment.

Factors in the workplace that help us provide good customer service

Participants indicated that our increased focus on enhanced communication and improved availability of tools to patrons were important factors in providing good customer service. Although staff is knowledgeable, an emphasis on customer service values is helpful when communicating information to patrons. Appropriate training and recognition of performance are important. Clear policies and procedures as well as positive support and leadership assist staff in providing good customer service.

Factors in the workplace that hinder good customer service

Factors hindering good customer service fell into three categories: skills, resources, and organizational structure.

Under skills, participants identified differing levels of technical skill, underdeveloped interpersonal and customer service skills, lack of knowledge of cultural differences, and rapid change as being hindering factors.

Under resources, insufficient staffing levels, under skilled evening and weekend staff, lack of study space, crowded stacks, restricted opening hours, and unwelcoming physical appearance of buildings and furniture as hindrances.

With regard to organizational structure, the hierarchical nature of the academic culture was identified as a factor that discourages a team environment. The Libraries’ clear policies and procedures, while considered helpful in providing customer service, sometimes restrict the staff’s ability to exercise judgment and discretion. Intolerance of cultural differences was also identified as a hindrance to good customer service.

Customer service practices to be improved through training

The customer services practices to be improved by training fell into six broad and inextricably linked categories and are discussed below. Within each category possible training activities were identified.

1) Communication

Communicate! Communicate! Communicate! As the saying goes, the three most important aspects of a successful training program are of course communication. Participants identified the importance of effective verbal, non-verbal, and written communication as the cornerstone of quality customer service.

Training activities in this area include understanding communication styles, active listening skills, effective telephone communication, positive and negative non-verbal messages, effective business writing, email etiquette, responding to negative communication.
2) Organizational Awareness

A better understanding of processes, practices, and services within other Library Units and Departments was identified as essential in order to assist staff with problems and inquiries that extend beyond the immediate scope of an individual staff member’s work area.

Training activities in this area include orientation sessions for new staff, job sharing/shadowing, twelve minute briefings.

3) Leadership

The development of leadership skills at all levels of the organization and the corresponding followership skills were identified as an important way to maintain a positive work environment and improve morale and ultimately customer service practices.

Training activities in this area include mentoring, coaching, teambuilding, supervisory skills, delegating, recognition and incentives.

4) Managing Change

The ability to manage the constant and fast pace of change in the workplace was identified as a critical skill to develop a workforce that is well prepared to respond to customer needs.

Training activities in this area include recognizing good and bad stress, managing competing priorities, and conflict resolution skills.

5) Diversity Awareness

The increasingly diverse cultural mix of students, faculty and staff presents new challenges for Libraries staff with regard to understanding customer expectations.

Training activities in this area include recognizing cultural differences, understanding the aboriginal cultural beliefs, asian culture, and others.

6) Technology Skills

Participants expressed the need for additional technical skills related to basic database searching. Weekend and evening staff in particular require more expertise in order to assist students with basic searching using Bison.

Training activities in this area include basic database searching, managing electronic files, and email.

What Next

The Staff Learning and Development Committee has begun to provide programming related to the Libraries overall Learning Organization initiative as follows:
Principles and Practices of Learning Organizations

Participants have been introduced to the five disciplines of the learning organization (Systems Thinking, Shared Visioning, Mental Models, Personal Mastery and Team Learning) and have begun to explore how these apply to the UM Libraries

- What is a Learning Organization? May 2003 All-Staff Meeting – Ros Howard
- Learning Organizations 101 – Ros Howard
- Customer Service Interview Matrix Meetings (4) – Using Learning Organization Tools
- Interactive Planning Retreat – October 2003
- Creating a Learning Organization – book by Barbara J. Braham – November 2003 All-Staff Meeting
- Understanding Your Learning Style Workshops – March 11 and 12, 2004
- Learning About Jazz – Regina Carter Concert March 13, 2004

Future Learning Organization Programming Possibilities based on Needs Assessment

- Managing Change
  - Learning to Thrive in an Ever-Changing Workplace
  - Planning, Setting Priorities, and Effective Time Management
- Leadership Development
  - Understanding Leadership and Followership
  - Shared Leadership
  - Coaching and Mentoring
- Organizational Awareness
  - Working and Learning Together
  - New Staff Orientation
  - InterUnit Info Sessions – 12 Minute Briefings, Brown-Baggers, Job Shadowing
- Communication
  - Active Listening
  - Written, Verbal and Non-verbal Communication
  - Communication in Groups and Teams
- Diversity Awareness
  - Creating a Workplace in Which Diversity is Valued
  - Managing Cultural Differences
- Technology Skills
  - Basic Database Searching
  - Email Do’s and Don’ts
Customer Service Programming

In conjunction with the overall Learning Organization curriculum above, Customer Service will be the focus of our Learning Curriculum for 2004-2005. The programming will include three modules with components specific to customer service as well as supporting skills as identified in the needs assessment.

The UM Libraries' Customer Service Philosophy

What does quality service mean in the UM Libraries? What are our customer service standards? The value of effective customer service and the role staff play in the delivery of good customer service.

- Orientation for new staff
- Re-orientation for experienced staff
- Coaching and Mentoring

Learning From Each Other: Achieving Service Excellence in Dealing With External Customers

External customer service requires the ability to listen to customer queries and negotiate for a successful outcome. These skills, in addition to the skills useful in dealing with difficult behaviors and resolving conflicts, will be discussed and practiced.

- Active Listening Skills
- Conflict Resolution Skills
- Communicate! Communicate! Communicate!

Working with Each Other: The Internal Customer Relationship

What is meant by the term internal customers? Who are they and how do we work together with them?

- Communication in Groups and Teams
- Shared Leadership
- Creating a Workplace in which cultural diversity is valued
Conclusion

Participants were appreciative of the opportunity to contribute to the development of a training program to assist them in providing the best possible service to students, faculty and staff and requested the opportunity to continue to be involved in the process. As a result this analysis is being circulated to all participants for feedback to insure that it represents the collective contribution of the matrix meeting attendees.

Once feedback is received from the participants, this analysis will be sent to other stakeholders such as LAG, PSCC, Circulation Committee, and LMAC for comment.

A detailed training program based on all the information gathered will be developed and presented at the All-Staff Meeting scheduled for April 27, 2004.

Presented by the Staff Learning and Development Committee
Susan Heidebrecht, Trudy Dyck, Mark O’Riley, Val Ward, Denise Reitsma, Debby Brown (Chair), Rosalyn Howard (Resource)
April, 2004