

OREGON STATE LIBRARY

Library Services and Technology Act Grant Activities Report

Quarterly reports must be filed even if there is no activity in that quarter

1st Quarter Report

3rd Quarter Report

2nd Quarter Report

X Final Report (*send e-copy to State Library*)

Project Name: Healing Through Collaboration: Completing health information access in Oregon

Grant Project Number: 10-05-5a

Date Submitted:

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1. Summarize the overall purpose of the grant project:

“Healing Through Collaboration” will complete the Portland health libraries consortium catalog by integrating bibliographic data from the Oregon College of Oriental Medicine (OCOM) with the shared catalog used by Oregon Health & Science University (OHSU), National College of Natural Medicine (NCNM), and University of Western States (UWS). Each college brings unique holdings to this collection, including OCOM’s exceptional resources on acupuncture and Oriental medicine (AOM). This project will facilitate better resource sharing among all of the institutions on the consortium catalog, further aiding in the continued development of interdisciplinary scholarship of different health modalities. By making these resources available to all patrons of the institutions and reciprocal libraries via interlibrary loan, there will be an increased awareness of AOM literature, thus opening up potential for better informed health practitioners and patients. Additionally the creation of new records in OCLC’s WorldCat Local will benefit the worldwide library community by offering them to new and rare AOM materials.

2. Summarize the project results to date:

Q1: As of the end of the 1st Quarter, OCOM has hired Veronica Vichit-Vadakan, MLS as the Systems Librarian who is spearheading the migration. Veronica has performed extensive quality control of the current text-based bibliographic records, particularly focusing on items that will be unique to OCLC, i.e. student papers and locally produced materials. She has also identified each field’s corresponding MARC tags, worked on standardizing wording and formats throughout the catalog, applied authority record standards to existing records and has been flushing out relevant material and adding necessary details for complete OCLC MARC records.

The OCOM library became an OCLC member in March and immediately began working with OCLC’s Batch Processing services to determine how best to convert and transfer catalog records. The text-based, non-MARC InMagic bibliographic records were sent to OCLC for a batch conversion in early April; this batch consisted exclusively of OCOM student papers. By the

middle of May, the records were converted to MARC, uploaded to WorldCat and returned to OCOM. After reviewing the records, they were uploaded to the OHSU server at the end of May.

Veronica also completed OCLC and MARC training sessions in April in which she learned the cataloging standards and technical details of cataloging as an OCLC member. She also had several meetings with librarians from the other consortium libraries in order to get input and advice for working on this catalog migration. They also discussed best practices and cataloging standards for the consortium. Veronica and Lana met several times with the project supervisors at OHSU to work out the timeline, responsibilities, and expectations of the entire project.

Q2: As of the end of the 2nd Quarter we have made significant progress toward completing our project. All of OCOM's bibliographic records have been converted to MARC, added to OCLC's WorldCat online catalog and have been returned to us in MARC format. Working with the Systems Librarian at OHSU, we have added these newly converted records to the shared catalog system. In all, more than 5,000 OCOM items have been added to the consortium catalog and are now fully searchable and viewable in the OPAC.

We have installed Innovative Millennium software on all the workstation computers at the OCOM Library. At the end of June, the staff members of the OCOM Library completed a three-day training course in the Millennium software which covered several aspects of the system including cataloging, circulation, serials check-in and running statistical analyses. Since then we have continued to be in close contact with Millennium, trouble-shooting various issues that have arisen in regards to move to the new system.

Now that our records are in the system and the staff has been fully trained on how to use it, we have been doing quality control: cleaning up our records, making sure that they conform with the local practices of the consortium, eliminating duplicates and updating record changes. In June, we hired a Cataloging Intern, Sarah Johnson, to assist us with much of this work.

Internally, we have met to discuss how our library policies may change with this new system. We've discussed adjusting loan periods, how to deal with fines, what procedures need to be changed and how to develop more consistency between institutions. Veronica, the Systems Librarian, has also met several times with the librarians at OHSU to discuss consortium cataloging standards, technical needs and reciprocal borrowing practices.

Veronica has also begun re-designing the library's catalog website so that the new public access catalog will be operational by the beginning of the new school year. This re-design should be complete by the beginning of Q3.

Q3: The beginning of the third quarter coincided with the beginning of the school year at OCOM and the official launch of our new ILS. We held training sessions for all library staff at the beginning of the term in order to familiarize everyone with the Millennium software, our new OPAC and the Consortium lending policies. An instructional manual was assembled by the Systems Librarian and uploaded to the library wiki, providing library workers with quick access to the knowledge base. This website helps staff with any issues they may encounter using the new software.

The library website was re-designed to accommodate the new OPAC and was customized for OCOM patrons. The library's WebPAC went live shortly before the school year started, making our records searchable by all OCOM and Consortium patrons. We have also developed on-line training materials for patrons to use while navigating the new OPAC. In addition, Candise Branum, the College Librarian, has discussed how to use the OPAC in her information literacy classes for incoming students.

So far the response to the new system has been positive from both OCOM and Consortium patrons. This can be seen in increased circulation which is particularly notable with inter-library loans in our consortium. In Fall of 2009, the OCOM Library had just 2 interlibrary loan book requests, and from Fall 2009 through Summer 2010, 17 non-journal items were borrowed from other institutions. In just two short months post-launching the new system, the library has borrowed over 25 items and lent more than 11. This partial count from the Fall 2010 term is more than double the amount of loaned and lent items from the entire 2009-10 school year.

We also began work on our WorldCat Local website which offers a way for OCOM patrons to easily search both our collection and the collections of libraries around the world. The library staff also took a three-day workshop in MARC cataloging language in order to learn how to make records that will be easily searchable and usable by all OCLC member libraries worldwide.

Through Quarter 4 we plan to continue cleaning up our records and making sure they conform to the cataloging standards of the Consortium. To that end, we have brought on a new Cataloging Intern who is working on catalog clean-up. We will administer a survey of all OCOM patrons for feedback on the OPAC and Consortium policies. And finally, we will continue to promote the library's catalog to all of the OCOM community.

Q4:

In this last quarter, we have been tying up the final loose ends of the grant. We have finished importing the last of our new serials records which are now updated and online. We completed the configuration of our WorldCat Local implementation which will allow students to search for material both in our collection and in libraries worldwide.

We continue to promote the new catalog system and the consortium to our patrons through classroom presentations, online announcements and in-library instruction. The work of catalog clean-up continues as well. We have made great progress towards getting our records to conform to the cataloging standards of the Consortium, but this will be an on-going process. Towards that end, we will continue to have staff and interns working on these records and we will continue to have our quarterly Catalogers' Meetings with the other Consortium catalogers to ensure standardization across all the libraries.

At the end of last term, we asked patrons to participate in a survey about library services including the new catalog. The responses were very positive, with the majority of students expressing their appreciation of the new system and its ease of use. They were also very happy with the increased access to other libraries' materials. One area of concern that arose is that 50-60% of the people surveyed had not yet placed holds online or had items transferred from other

consortium libraries. Whether this lack of use was due to our library having adequate materials or whether it was due to students not knowing about this service is unknown, but we will continue to publicize the catalog via our library website and in classes during information literacy sessions.

We will be holding an all-staff library meeting during the last week of January to check in with support staff and discuss any lingering issues people are experiencing with the new system.

As the fourth quarter ends, we are delighted to report that the all the goals of the grant proposal have been achieved. Our catalog records are now accessible in a fully integrated library system. We have fully integrated our library records with those of the other Consortium schools. We have introduced the new cataloging system to our patrons who report their satisfaction with the increased availability of items and the ease of using the system. And, best of all, we have greatly increased circulation rates both for both OCOM’s items and consortium libraries’ items.

Outputs Summary – please report as appropriate depending upon your grant
(double click Word table to enter data- table can be altered to record appropriate outputs)

Actual # of people served this quarter		Actual # of people served to date	600
# of programs /meetings /events		# of programs /meetings /events to date	18
# of programs /meetings /events attendees		# of programs /meetings /events attendees	40
Other output measure(s): <i>(please indicate)</i>	0	Other output measure(s) to date:	0

Narrative summary:

Q1: The migration process was mildly slowed down due to difficulties contacting and securing timelines for record conversion with OCLC; we anticipate being able to stay on time for the rest of the migration despite this delay.

Q2: Much time was spent this quarter in meetings, training and in both internal and external discussions about how to launch the new system. All of our records are now in OCLC and in the consortium catalog, but we do not yet have all of our patron records and circulation parameters set up so we the system is not fully usable by our patrons.

Q3: The migration was completed and the new system implemented in time for the new school year. Library cards were made and distributed to OCOM students, faculty, alumni, staff and

community practitioners. Library staff received extensive catalog training and other patrons used online help materials. Our records and materials were made available to all libraries in the Consortium.

Q4: We completed our first full school term with the new system in place and it was a solid success. Aside from a few initial bumps, the system is now running smoothly with student library workers easily handling circulation on their own. Patrons have also been learning to navigate the online system for managing their accounts and have been using it more and more.

3. Report on specific project objectives to date:

Objective: Migrate 100% of OCOM’s present bibliographic data onto the consortium catalog by the end of the third quarter of the grant cycle.	% Progress / Results: 100%
Activity Summary: <i>(type below this table)</i>	

Q1: All bibliographic records for OCOM student papers (master’s and doctoral) have been migrated to the OHSU server and onto the consortium catalog.

Q2: Over 5,000 bibliographic and item records have now been added to the shared catalog. This represents all but a small handful of records that require added attention before being added to the catalog.

Q3: The few remaining bibliographic records have been added to the catalog. The full system has launched and is now being used for our WebPAC, circulation, cataloging and statistics reporting. There have been a number of small technical issues to troubleshoot since the launch, but they have been resolved. We continue to look for ways to improve the operation of the system.

Q4: With all of our existing catalog records already migrated, we are now able to focus on cataloging new materials, including a backlog of older items that can now be added to our new catalog.

Objective: Develop processes and policies to have seamless access between libraries by the end of the second quarter of the grant cycle.	% Progress / Results: 100%
Activity Summary: <i>(type below this table)</i>	

Q1: We had a quarterly cataloger’s meeting for the shared catalog and have identified a plan to have clear communication to patrons from all institutions. Veronica and Lana have also been meeting with key contacts at OHSU.

Q2: Along with librarians from the other consortium institutions, the staff librarians at OCOM completed 3 days of Millennium training. The OCOM librarians met together and worked out all the details of our new policies regarding the new catalog and our relationship with the consortium schools. Veronica has met several times with the librarians at OHSU to discuss policy matters from cataloging practices to lending rules. At this point, all of the plans for

seamless sharing among the libraries have been determined; however, once the new school year begins and more inter-library interaction is taking place, we'll re-examine policies and adjust them as needed.

Q3: With the public launch of III Millennium and WorldCat Local, the OCOM Library has seen a huge increase in the number of requests to and from the other consortium institutions. Because of the specialized nature and small size of our institution, we have decided to limit lending of materials to institutions within our Portland-based shared Consortium catalog. Reciprocal borrowing and the shipping of materials has so far been a smooth process, so there is not currently a need to re-evaluate the current policies.

Q4: We continue to share materials with the Consortium and have yet to run into any difficulties in that area.

Objective: Increase outgoing and incoming interlibrary loan requests with an expected rise of at least 20% by the grant's completion.	% Progress / Results: 100%
Activity Summary: <i>(type below this table)</i>	

Q1: N/A

Records for circulating items have not been added to the catalog; OCOM patron records have not been added to the system.

Q2: Records for circulating items have been created and added to the catalog, but without completed OCOM patron records and the full range of circulation parameters, we have not yet been able to circulate items using the new system.

Q3: In order to keep track of interlibrary loan statistics, we have utilized Innovative's *Web Management Reports* function to track the number of items lent to and borrowed from other institutions in the consortium.

Just before the new system was launched, training on circulation procedures was provided during a mandatory library staff training in order to ensure staff members understood how to circulate materials and assist patrons effectively. Emails were sent out to all students, staff and faculty informing them of the new system and instructions on how to get a new library card, and a flier was created to promote the new services.

In the first year research class and in the doctoral student information literacy module, the College Librarian taught students how to use the catalog, including searching both OCOM's collection and the entire consortium's collection, as well as showing students how to place holds on materials.

The Systems Librarian also created an extensive online tutorial of the Catalog, detailing both basic and advanced functions of the system.

All of these efforts have already resulted in a large increase of interlibrary loans just a few months after launching the system. We will continue to promote the services and materials available.

Q4: After implementing the new catalog, the OCOM Library has seen an immense increase in interlibrary loan activity. From Fall 2009 through Summer of 2010 (the previous school year), the Library borrowed 17 items from other institutions; our lending count was at zero. Fall term has seen a dramatic rise, with 43 items borrowed and 57 items lent to other institutions. This is about a 152% increase in incoming and a 5,700% increase in outgoing loans. Our goal for this project was to see a 20% increase in interlibrary loan requests, a goal of which we have exceedingly met.

4. Significant developments:

Q1: N/A

Q2: Lana Thelen has stepped down from her role as OCOM's College Librarian. In her place is Candise Branum, who has worked in the OCOM Library for the past three years, assisting in the original grant proposal for this project. Candise has discussed the intricacies of administering this grant with Lana, Veronica and Ann Reed, and is confident that the project is running on track in regards to both time and finances.

Q3: N/A

Q4: Though the LSTA funding of this project is coming to a close, the impact of this project will soldier on. Of special note is the lending statistics; though the Library had previously had reciprocal borrowing agreements with other consortium members, students and staff members of the consortium schools had not been taking advantage of this agreement. Joining the shared catalog has opened up OCOM's collection, making it easier for non-OCOM affiliated patrons to access our materials, and we expect this upward trend to continue.

The response from students and library staff has been very supportive. After attending a staff training session, a work study student cheerily noted, "This is great – I feel like I work at a 'real' library!" This is exactly what we were hoping to accomplish with this project – this huge technology boost has allowed us to share materials openly, promoting cross-disciplinary study with other Portland-based western biomedical and alternative medicine schools.