

LIBRARY BEST PRACTICES MINI PEER EXCHANGE AND SITE VISITS

Hosted by the Minnesota Department of Transportation and Wisconsin Department of Transportation Libraries

November 16-17, 2009

Introduction

The Minnesota Department of Transportation and Wisconsin Department of Transportation libraries hosted a library best practices mini peer exchange November 16-17, 2009. The purpose of the mini peer exchange was to give pooled fund member librarians from state departments of transportation a forum to improve the quality and effectiveness of their library services and an opportunity to visit other DOT libraries

Participants in the mini peer exchange and site visits were:

- Sandy Brady, M.L.S., Librarian, Louisiana Department of Transportation LTRC-TTEC Library
- Alexandra Briseno, M.L.I.S., Librarian, Michigan Department of Transportation
- John Cherney, M.L.S., Head Librarian, Wisconsin Department of Transportation
- Sheila Hatchell, M.L.S., Library Director, Minnesota Department of Transportation
- Zona Kahakonen Keppler, M.L.S., Librarian, Ohio Department of Transportation
- Qin Tang, M.L.S., Cataloger, Minnesota Department of Transportation
- Karen Neinstadt, M.L.S., Marketing and Outreach/Reference, Minnesota Department of Transportation
- Jim Byerly, M.L.S., Electronic Resources, Minnesota Department of Transportation

Also participating as the facilitator was Maggie Sacco, M.L.S., Consulting Librarian, TPF-5(105), CTC & Associates LLC

To prepare for the peer exchange, the participants submitted topics for discussion and gathered documentation describing their libraries' resources and practices. Maggie Sacco served as the organizer and facilitator. The discussion covered each host DOT library's practices in providing information services and those used in other participants' respective organizations. The discussion both days was informal and provided the exchange participants an opportunity to express their own concerns and challenges and listen to experiences, technical accomplishments and suggestions from their study partners.

Focus

The participants began the discussion with a review of the agenda topics and distribution of the documents detailing library resources and statistics from participants who were able to provide them.

The primary focus of the site visits and mini peer exchange at the Mn/DOT and WisDOT libraries was the opportunity for participants to see two examples of established full service DOT libraries that strive to innovate and stay on the leading edge of information services and technology, while providing a forum to exchange best practices with the host libraries' personnel and the other participants. However, all aspects of transportation library services were open for discussion within the context of the agenda topics:

- What do your patrons most need, want, and appreciate from your library?
 - Services, resources, physical space
- How do you manage research requests?
 - Methods of submission (email, chat, phone, face-to-face consultation)
 - Methods of gathering information
 - Presentation (synthesis, trend tracking, other value-added services)
- How do you communicate the value of library services

- Statistics: How do you track? (software, database, excel, paper)
- What statistics do you keep?
- Reporting: How do you present the library to your managers?

Major Observations of Peer Exchange Team

- Patrons are becoming more information and technology savvy and this is resulting in more demand for library services and resources, not less.
- Budget crises are severely hampering librarians' fulfillment of patron needs from within the libraries' collections; sharing resources through library networks is paramount and will increase over time.
- Innovation and creativity are crucial to positioning the library as an indispensable resource within the parent organization.
- Participants expressed interest in other librarian's approach to information requests, including literature searches. Sources consulted and thoroughness of consultation were high priorities.
- Participants are interested in value-added services.
- Promotion of services is key to the library's survival, but lack of staff and resources must be considered when promotion will cause an unmanageable workload.
- Effective communication to managers and CEOs about the value of library services in a Return on Investment framework is crucial.
- Transportation librarians are rarely subject specialists in the multidisciplinary field in which they work. Providing services to engineers and other transportation practitioners requires development of communication skills and a familiarity with technical terms. Time and education through conferences are key to acclimating to terminology, subject areas, and applications.
- The librarians would like to understand better how transportation agencies partner with universities the way that LaDOTD/LTRC has (Louisiana State University) and Iowa DOT and Iowa State have. These libraries enjoy much greater access to resources than the other DOTs who are not partnered with universities.

Opportunities Identified by the Peer Exchange Team

- Use free databases such as TRIS, ASCE engineering databases, and those available through local, regional and state consortia memberships.
- Methods of gathering information are similar. All start with research proposals and look in RiP, TRR, etc. and move on to databases with published results.
- Take advantage of personal interactions to promote library services. The two minute "elevator speech" should be utilized whenever library staff encounters high level managers or CEOs.
- Work with graphics staff to develop a library logo to brand your emails, print and electronic documents and services.
- Capitalize on value-added information services with full service presentation, analysis, trend tracking and library branding.
- Ask about requested timeline up front and prioritize requests accordingly. Consult with customer and Transportation Research Thesaurus for proper terminology when constructing search strategies.
- Contact staff that can get you into high level meetings for a presentation on what the library can do for specific projects.
- Develop a marketing packet focusing on how the library can help customers reach their strategic goals.
- Do as much as you can without involving communications and/or IT if they will restrict or slow you down.
- Survey the department for access to publications and databases that are part of required professional memberships (engineers) to avoid duplication within the department.
- Provide regular reports using return on investment data and customer testimonials to demonstrate the value of library services to managers. A report template should be developed for libraries.

Library Status Reports by the Peer Exchange Team

Alexandra Brisenno, M.L.I.S., Librarian, Michigan Department of Transportation

1. Patrons want more print and online resources that the library can't provide due to a complete loss of materials budget in 2007 (from \$27k to \$0). Actually, I found old budget docs for the library that stated a \$15K budget for books and a \$22k budget for subscriptions (neither have now)
2. The Library was closed from 2002-2007 MDOT due to fire, and the resources that were there previously are now gone.
3. Interlibrary loan is the only way to obtain needed materials for customers, so OCLC subscriptions and the TKN Resource Sharing Pilot are vitally important.
4. Alexandra uses a form designed by CTC & Associates for literature search requests.
5. The MDOT Library tracks statistics on paper tally sheets including circulation, ILL/Document Delivery (in/out/filled/unfilled/inside-outside collection), literature searches, reference (in-depth and ready reference).
6. The MDOT library isn't heavily used at this time. Even though the library does outreach with fliers, brochures, etc., there is a lack of awareness of the library. More effort is needed in this area.
7. The library's **Cuadra Star** catalog is intranet only due to firewall issues, so patrons can't search offsite.
8. The MDOT library relies on free publications from AASHTO and TRB.
9. The **Library of Michigan** is being reorganized and decentralized.

Sheila Hatchell, M.L.S., Library Director, Minnesota Department of Transportation

Qin Tang, M.L.S., Cataloger, Minnesota Department of Transportation

Karen Neinstadt, M.L.S., Marketing and Outreach/Reference, Minnesota Department of Transportation

Jim Byerly, M.L.S., Electronic Resources, Minnesota Department of Transportation

1. Customers want to learn more about searching on their own, but want the library to take a leadership role in technology.
2. A technology fair is planned as a follow up to the Emagination Jam that was held to collect ideas. One suggestion was to put library outside the firewall for wi-fi and Web 2.0 to alleviate security concerns.
3. The library needs a marketing plan, which will be Phase Two of the business plan developed recently.
4. Mn/DOT tracks Library statistics in MS Excel including circulation, ILL/Document Delivery (in/out/filled/unfilled/inside-outside collection), literature searches, reference (in-depth and ready reference).
5. The library would like to increase visibility in first floor lobby which is somewhat complicated due to required permits from the building management Dept of Administration.
6. The focus of questions and kind of information customers want has changed over time. Customers want librarians to select resources and to provide more synthesis or analysis.
7. Innovation is a focus. The library recently purchased four **Amazon Kindles** that will be loaded with requested information and circulated.
8. Mn/DOT has web submission form for reference and literature search requests and a central library email account accessed by all reference librarians. Requests are also taken by phone, personal email and in person.
9. Typical literature search results are synthesized and organized to include Web results, Mn/DOT library resources, databases, etc. and PDFs, and are branded with the Mn/DOT library logo.
10. Transportation Knowledge Networks used to exist with subject experts. The Mn/DOT commissioner wants to see these at the state level. Sheila has learned to use risk analysis for decision making and library strategic goals. Sheila is proposing a TKN for risk management and innovation for subject specialists to come together on collaborative site to work on these issues.

Zona Kahakonen Keppler, M.L.S., Librarian, Ohio Department of Transportation

1. ODOT does not allow access to Web 2.0 tools. This is a major challenge that must be addressed, as many useful tools are in use increasingly in the DOTs and federal government.
2. Space is a big issue for the ODOT Library. The collection is in five different locations in the building which presents access issues.
3. The Library collection hasn't been developed for the last couple of years, but judicious weeding is taking place in preparation for updating.
4. The ODOT Library tracks statistics on paper and uses their circulation system to generate reports of usage including circulation, ILL/Document Delivery (in/out/filled/unfilled/inside-outside collection), literature searches, reference (in-depth and ready reference).
5. Marketing and outreach are needed to reach beyond the core group of users.
6. The Library is working on a strategic plan.
7. The Library has champions, including Monique Evans, Head of R&D.
8. The Library's budget is healthy and they can purchase whatever they need. They are aligned with the Ohio State Library, which includes a shared catalog cataloging of new materials, and a piggyback OCLC subscription.
9. Zona would like to do a survey of library awareness and customer needs.
10. There are plans to participate in new employee orientation and train people on the use of the catalog and databases. Individual training is ongoing and they are now incorporating other things into training like RSS feeds.
11. The Library has an online research request submission form and presents the results in a similar value-added format as Mn/DOT (above).
12. The Library created a SharePoint site for library and is now being used as an example for training. It includes announcements; a new titles list and user statistics.
13. The Library Web site needs redesigning and updating.
14. Zona feels the library is delivering information customers want.

Sandy Brady, M.L.S., Librarian, Louisiana Department of Transportation LTRC-TTEC Library

1. The Library is receiving research requests but is not getting feedback on how well the information fulfills customers' needs.
2. A survey is needed at this point to find out what customers want and what services or methods of delivery could be improved.
3. Sandy is planning to set up a user account for the LTRC for the Louisiana State University Library ILL services. It is often faster than OCLC.
4. Sandy has instituted some Web 2.0 tools such as flickr, a blog and chat reference on the Library's Web site.
5. The LTRC Library tracks statistics in Excel including circulation, ILL/Document Delivery (in/out/filled/unfilled/inside-outside collection), literature searches, reference (in-depth and ready reference).
6. Sandy looked at RefWorks is working with a student to create relational db to track requests.
7. Sandy compiles research and literature search results in a MS Word document with citations and links to full text resources. She would like template to include branding and better organization of findings.

John Cherney, M.L.S., Head Librarian, Wisconsin Department of Transportation

1. The Library was redesigned as an iCommons in 2007-2008 to increase visibility, accessibility and user comfort.
2. Part of the iCommons mission is to serve the public as well as the internal DOT staff.
3. The public makes use of the copy machine, free internet, newspapers, magazines, some transportation research.
4. Internal DOT customers want standards and specifications, computer training materials, reference and literature searches.
5. John is tracking statistics in Excel, on paper and with Google Urchin including circulation, ILL/Document Delivery (in/out/filled/unfilled/inside-outside collection), literature searches, reference (in-depth and ready reference).

6. The WisDOT Research & Library Advisory Committee met quarterly starting in 2007. Attendance has dropped and the committee intends to continue as research advisory committee.
7. WisDOT has strong library champions in administration and throughout the DOT, including the deputy secretary, division administrator and administrative bureau directors. Many of these relationships begin as one-on-one interactions with delivery of information services.