

**Duke University
Medical Center Library**

**The Best Way to the Best Information:
Strategic Plan 2006-2010**

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Duke University Medical Center Library & Archives

Strategic Plan 2006-2010

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- Identify and implement new approaches for delivering information
- Recognize and define reference services as the gateway to other services
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The Library Staff – Making the Library More than a Collection and Facility

- Increase outward focus and activities of the staff
- Ensure staff has skills for a technology intensive environment
- Provide a work environment the supports each staff member
- Identify more efficient approaches to work
- Develop the leaders of tomorrow

Underlying Assumptions

**Duke University
Medical Center Library & Archives**

Strategic Plan 2006-2010

Vision

The best way to the best information

The mission of the Duke University Medical Center Library & Archives is to provide high quality and customer-oriented information services and resources to support the education, research, and patient care mission of Duke Medicine, including the School of Medicine, School of Nursing, Duke University Hospital and Health System.

To achieve its vision, MCLA will:

- Provide high quality information at the point of need.
- Educate Duke Medicine faculty, staff, and students about locating, evaluating, utilizing, and managing information resources.
- Maintain, preserve, and provide access to materials for current and historical research.
- Support leading-edge technologies for the delivery of information and education.
- Build and maintain a reliable, fast, and easy to use infrastructure for the delivery of information and services.
- Create a rich and supportive work environment that attracts, develops and fosters the most qualified and skilled library staff.
- Promote library staff to the Duke community as educators, consultants, facilitators, and information experts.
- Build strong partnerships with other Duke departments and support services.
- Work collaboratively and cooperatively with other libraries and institutions to enhance and expand resources and services.
- Secure financial support for maintaining and expanding services and resources.

Values

In attaining its vision and goals, the Medical Center Library will maintain the following values:

- Respect diversity in Library staff and patrons.
- Ensure integrity, accountability, and open communication in all that we do.
- Uphold professional standards and ethics.
- Foster a positive work environment that values teamwork, creativity and good humor.
- Encourage internal and external collaboration and cooperation.
- Respect confidentiality and privacy of our patrons and staff.
- Embody excellent customer-service skills and attitudes in all interactions with the public and each other.

Library Clientele: Whom We Serve

Primary Users

- Duke University Medical Center and Hospital faculty, residents, staff, and students,
- Official affiliates, such as Duke University Affiliated Physicians and preceptors.

The needs of primary users drive our collection development decisions. They receive access to all our resources and services. We provide them with instruction and guidance within the Library and in off-site locations. We will design or tailor services for these patrons. We seek their suggestions and feedback on how to change or improve our services and resources.

Secondary Users

- Duke University Health System affiliates and medical staff
- Duke University (non-DUMC) students, staff, and faculty
- Duke patients
- Triangle Research Library Network (TRLN – UNC-CH, NCSU, NCCU) students, staff, and faculty

Secondary users benefit from resources and services provided to our primary clientele but they have more limited access to our resources and services. The level of access may vary between the different groups. Limits may be set on the time devoted to providing services to secondary users. They may be referred to their primary library or other resources designed to serve their needs. In some instances, secondary users must be present within the Library to use the resources or services. They have less influence on our collection development decisions, but their needs may be considered in relation to the larger University, TRLN, or library community. MCL works with other Duke and non-Duke libraries in collaborative efforts to meet their information needs.

General Public

- Health professionals in the RTP and Durham County areas
- Groups with special affiliations or agreements with MCL, such as UHMS members
- Other libraries, which rely on our collection
- Health care consumers
- Other health professionals in North Carolina (not in RTP or Durham County)
- General public
- Students outside TRLN

The members of the general public are our tertiary users. This group receives basic services. They usually do not influence collection development. Some special handouts may be created to assist these users in locating information. The Library works collaboratively with other Duke departments and libraries in providing access to health information.

Vision For Role In Duke Medicine

The Medical Center Library's vision is "The best way to the best information" and that vision must continue to guide the Library in supporting Duke Medicine, including the Schools of Medicine and Nursing, Duke University Hospital and Health System, in their missions. This vision is shared by the Duke Medical Center Archives whose mission is to retain and preserve both institutional records and history for current and future use. This vision requires ensuring access to the best and most relevant information sources and technologies that are easy to use from any location. But in addition to acquiring knowledge-based resources and storing institutional records, the "best way" also requires continued training in the optimum use of the resources for education, research, administrative work, clinical care, and ultimately the reduction of medical errors and the delivery of high quality healthcare.

Major Areas of Emphasis

While research and clinical services will remain two major areas of emphasis and drive the generation of funds for other activities, educational activities will continue to grow and evolve in importance. The information needs of the faculty and learners will increase as the School continues to implement its new curriculum and discover the most effective ways of developing competent health professional students. The learning environment will require better integration of information tools and skills to support the curricula and future innovation. Fortunately many of the basic information resources used within clinical curricula are considered core materials for any medical library and will also support general clinical care and services.

The more challenging issue is to maintain the highly specialized scientific and specialty resources needed to keep Duke University at the forefront of specialized medicine, and basic sciences and translational research. It is these materials that differentiate an academic health center library from a hospital or smaller medical school library. It is also these specialized materials that drive the costs of providing access to the latest and best quality information tools.

Higher Expectations of Clientele

New faculty and students will arrive with higher expectations regarding information services. They will expect, and are currently demanding, immediate and easy access to a broader range of materials. Due to powerful new search engines, including Google, they are identifying a wider variety of relevant resources, which cut across all disciplines and exceed the collection and budget of the library, to support their work and learning. They expect integrated interfaces for all the tools available and the use of Web-based and other technologies for the effective and efficient delivery of full-text to their desktop, laptop and hand-held devices. Easy access to a full array of information resources will become a recruitment and retention issue.

Due to the increased multidisciplinary nature of academic programs, more and more faculty will be using resources across the University campus – resources provided by the main library, as well as, sciences, law, and business libraries. The Medical Center Library & Archives (MCLA) must work with main campus on sharing costs for electronic resources and selecting new interfaces for databases and other information tools. The School of Medicine must understand its role and responsibility in sharing the costs with main campus for the acquisition of the additional databases needed to support multidisciplinary initiatives.

Emerging Trends and Issues

Emerging trends and initiatives within research and clinical care will have an impact on education and information services, including how the Library needs to deliver its services and resources. Evidence-based medicine, patient safety, the protection of human subjects, and the reduction of medical errors demand the delivery of information at the point of care and decision-making. This will require the use of new technologies, interfaces, and methods to ensure information is available when and where it is needed.

Capturing the history, culture and legacy of Duke will continue to be of importance as we move from our 75th anniversary toward our 100th year. The current research on the history of the Duke Medicine have underscored the fact that documents need to be captured and preserved in a more routine manner. It is also essential to retain the records and papers of key leaders as administrators change and people retire. Record retention and preservation will become more of an issue as storage space becomes tighter and tighter, and the capture of digital records and files becomes a major challenge. Duke Medicine must implement a more comprehensive plan for ensuring records are not lost, deleted, or thrown away without consideration for future business operations and research.

Financial pressures will continue to be an issue in health care and medical education, as well as within the Library. Library resources will need to be aligned with institutional priorities throughout all departments. However, the pressures on the Library budget will continue to be great, due to a number of factors that have a significant impact on library budgets:

- Electronic formats of materials, even those born-digital, are more costly than print versions or equivalents.
- The price of electronic resources will continue to rise faster than standard inflationary costs.

- New and more efficient information tools will emerge with even higher price tags.
- Alternative pricing models will evolve based on usage formulas with the potential for higher increases from year to year.
- Most journals will continue to follow the standard subscription model, as opposed to author-pays or true “open” or free access models.

The demand for new journals and e-resources will continue to grow, and more new titles will appear. Some departments and researchers may resort to purchasing their own materials or purchasing “by-the-article,” which could have an impact not only on department budgets, but also on the cost-effective access of sharing university funded resources.

In The Next Five Years

Based on the future vision and issues above, these are some of activities that the Library must pursue to support the mission and initiatives of the School of Medicine and Duke Medicine, as well as its own vision.

Collections/Resources:

- Move an increasing amount of materials to electronic resources when available and cost-effective.
- Continue the balance between paper and electronic resources, preserving access to older non-print materials to support research; some subscriptions will continue to be only in paper format, and the last 25 to 30 years of print literature will remain important to researchers and clinicians.
- Implement technological solutions for ensuring long-term access to electronic journals without additional charges.
- Support patrons’ preferences for electronic access for quick reference and print textbooks for more in-depth reading and research; maintain a core book and reference collection.
- Provide access to more Web-based multimedia programs and sets of digital images for teaching and learning.
- Phase out the old audiovisual collection, replacing it with online learning materials.
- Monitor and assess the development of new information tools that integrate diverse e-resources and organize information for the user.
- Address the issues of ongoing access and preservation to electronic materials through initiatives such as content management systems, digital repositories, and archiving systems.
- Store more and more archival materials in off-site storage if economically feasible.

Services:

- Continue the development and enhancement of the Library’s and Archive’s Web sites as portals and tools for accessing information resources.
- Identify new ways of organizing, presenting and integrating electronic resources and services that are accessible and actionable at the point of need.
- Develop more customized Web-pages and training programs to meet unique information needs of departments and programs.

- Expand evidence-based medicine training throughout the curricula and across all learners in order to support quality health care and the reduction of errors.
- Develop a more robust information management curriculum for students and faculty.
- Work with DHTS, DUH, publishers, vendors, and other groups to integrate information resources into clinical systems.
- Continue to provide educational materials about new e-resources, searching techniques, and services to make patrons aware of the resources available to them and how to effectively use them.
- Develop more online modules for just-in-time learning of information retrieval techniques.
- Utilize new technologies and databases to deliver new information resources, including building an institutional repository of digital and archival records and intellectual property.
- Continue to educate learners, faculty and staff about scholarly communication and intellectual property issues, which are increasingly important in the digital environment.
- Offer a platform for authors to mount copies of their articles (as approved by the publishers) on a local institutional server to support access.

Staff

- Increase the outward focus and activities of the staff and work with departments and programs within their environment.
- Assign staff to assess specialized information needs and create services and training that address those needs.
- Ensure staff remains current in the application of new technologies for information management.
- Realign staffing patterns and skills to support priority services.
- Retool staff to meet the changing information services environment.
- Maintain motivation of staff during difficult budget times and restricted resources.
- Promote innovation and creativity in designing and implementing services within a constrained budget.

Funding

- Establish a shared-cost model for general and specialized databases and electronic resources among MCL, School of Medicine and Duke University libraries.
- Develop a more active fund-raising campaign to underwrite collection costs, special projects, and facility renovations.
- Explore further cost-sharing models within the School for new resources.
- Develop a more robust system for tracking departmental expenditures for journals, books and other library-related materials to ensure cost-effective use of funds and shared access to materials.
- Develop a long-range plan for record management and retention with main campus and identify costs of future growth options.
- Identify the true costs and charges for off-site storage and on-site delivery of older materials.

Facility

- Reduce the number of older collection and archival materials in the current facilities by storing items in the Duke Library Service Center, if that option is cost effective, or by disposing of older materials available through other resources.
- Implement the Library Space Planning Committee recommendations and proposed building program for expanding and renovating the Library facility.
- Integrate more educational and technology-based activities within the library facility.
- Create a central service desk or hub for services provided to the Duke Medicine community, including the provision of staff to assist with library, technology and other patron questions.
- Continue to provide spaces for collaboration, socialization, group work, and quiet study.
- Investigate the feasibility of moving Archives back to campus in order to strengthen its program and ensure timely deposit of institutional records.

In Ten Years

The assumption is that research and clinical services will remain strong within the Duke Medicine. The multidisciplinary approach to education as well as research and patient care will increase as well.

Growth of Electronic Resources

Electronic resources will be the dominant format and there will be more of them. Their costs will still be high and users will demand newer tools as they are released. The usage of medical books will decline, but the journal (electronic format) will continue to be the key source of information. Publishers may begin charging for continued access to the back volumes of e-journals and may implement annual fees (above and beyond current fees) to provide continued access to older materials. The older paper volumes will be less relevant and most will be in storage or in regional repositories.

New and expensive research tools will emerge for searching across numerous publishers and commercial resources. The tools will help manage the information by sorting the research results, customizing the presentation of information, and reformatting it for use in publications, CVs and other documents. It will be easy to link resources into institutional databases such as faculty research profiles and patient records. Faculty will be able to link course Web sites to specific parts of books and journals, as well as contextual database searches.

Large image databases will exist, and faculty and students can easily create Web-based and customized courses and learning modules through easy to use software and templates.

Highly specialized evidence-based tools and databases will emerge that mine the data from journal articles, rank it for relevance to a specific patient question or research project, and present it in an actionable format.

It will be possible to link clinical information resources (books, journals, databases) directly and easily to patient records. Resources will then need to be chosen with the highest relevance and quality of content to support health care decisions.

Library as Place

The traditional Library of stacks and large collections will be gone. Instead, there will be collaborative workspaces, multimedia resources and technologies, and support for a myriad of educational and instructional technology activities.

Archives

Archives will continue to grow and move further into the digital realms of storage and access. Archives will need to hire and retain more staff comfortable with digital technologies. A campus-wide system for capturing digital records and content will need to be implemented with DHTS, OIT, and key administrative offices.

Funding

Funding will continue to remain a challenge as new resources continue to be developed. Prices will remain high for e-formats due to the publishers' early development costs, content fees, and the ongoing needs to refresh and upgrade underlying computer systems. Faculty will expect Duke to continue to provide access to new titles, as well as traditional publications. The Library will have to continually re-evaluate its collection in relation to institutional priorities. There may be a shift to buying articles (pay as you go) for materials not held by the Duke libraries.

Important Measures of Success

The Library & Archives perform many roles with-in the complex environment called Duke Medicine. There are numerous and divergent demands on these departments; their success may mean different things to different groups. However, underlying these differing needs and demands are an underlying set of success measures, which are basic to any successful library and archives program.

- Acquisition of materials that are relevant to the programs, services, and mission of the institution – ascertained through regular faculty feedback on collection strengths and weaknesses as well as utilization data.
- Minimizing the number of requests that must be filled by other libraries or sources, a measure of the strength of the collection,
- Delivery of services that are needed by the various user groups, including customizing or offering specialized services when cost-effective.
- Strong user satisfaction with the Library & Archive Web sites and pages, as well as data on the utilization of Web resources.
- Easy, effective and stable delivery of information resources at the point of need – in the lab, beside, classroom, and administrative office.
- Increased presence of Library & Archives staff in departments, schools, and other areas.
- New partnerships and increased collaboration with faculty, departments, and other groups on methods for addressing information and archival needs.
- Integration of information management training throughout all the curricula.

- Effective use of new technologies and advances for integrating information into patient care, research and education and for retaining, preserving, and accessing institutional records.
- Ensuring that one of the best things about the Library & Archives is access to high quality services and resources that is time and location independent.
- Integration of the library as place into the learning community.
- Routine and timely deposit of institutional records from all major administrative offices.
- Capture and preservation of papers and documents from key leaders, researchers, and clinicians.
- Implementation of an automatic system for capturing, storing, and preserving digital records.

Most Important Opportunities in Next Five Years

The Library & Archives must be poised to take advantage of opportunities that are emerging over the next five years. Both must maintain structures and resources that enable them to be nimble in addressing shifting information needs and evolving programs. Both must continue to scan the horizon for trends in the environment, technologies and Duke Medicine initiatives so they can be positioned to take action when opportunities occur that will strengthen and improve resources and services. Such trends include:

- New technologies and interfaces that facilitate access to information resources without significantly increasing costs.
- Technology for capturing and storing large amounts of data, such as institutional records and email.
- Expanded use of database and other technologies for the organization and delivery of Web-based resources.
- Electronic resources that enhance access from remote locations at anytime.
- Integration of knowledge-based resources into clinical and research information systems.
- Implementation of the Space Planning Committee recommendations and the resulting building program.
- Information resources for mobile technologies (handhelds, tablets, phones, etc.)
- Increased focus on information management/informatics training for students, residents and faculty focusing on the effective use and organization of information resources.
- Selection and filtering of relevant resources by professional library staff.
- Repositories and interfaces for fast and efficient access to institutional records.
- Increased need for evidence-based information to support best practices and decision-making in the health care and research settings and training to locate and use the appropriate decision tools.

Most Important Opportunities in Ten Years

- Development of interfaces that search across commercial databases and e-resources.
- New tools for organizing, sorting and querying research data as well as traditional published sources of information.
- Improved technologies for delivering printed materials to mobile devices.

- More national databases of free or shared educational and research resources, such as images, digital objects, and data sets.
- More acceptable formats for reading materials online and therefore less and less demand for print materials.

Significant Barriers in Next Five Years

In addition to identifying opportunities, the Library & Archives must also be aware of barriers to success. The Library & Archives must work with the School of Medicine, Duke Medicine and the other university libraries in order to remove or minimize these obstacles to success.

- Increased costs of electronic materials and technologies.
- Maintaining a funding level to ensure the necessary resources and staff, as well as collections, are available to serve the community and keep pace with evolving information needs.
- Controlling departmental expenditures on books, journals, databases and other library-related materials, resulting in needless duplication and decreased access to resources, which should be coordinated and shared across the campus.
- Additional funding to support University-wide and multi-disciplinary resources.
- Inadequate staff size to support all the services and resources demanded by the Duke community.
- Inability to hire new staff with additional skills to meet increased demands and implement new services.
- Loss of experienced, professional librarians due to small staff, reduced resources, and heavy workload.
- Difficulty in recruiting highly qualified staff due to reduced resources and shrinking applicant pool.
- Retooling or replacement of current staff skills with those needed in a more digital environment and that reflect evolving services.
- Availability of additional, and affordable, technical expertise in creating databases and implementing new technologies.
- Lack of adequate Archives staff to process institutional records.

Significant Barriers in Ten Years

- Funding will continue to be an issue for electronic resources and staffing.
- Additional funding will be needed to bring up new archives of older journal volumes as well as new databases.
- Inability to keep pace with new technologies due to funding and lack of staff time and expertise.
- Loss of highly qualified staff and leaders due to retirements within next 10 years (graying of the profession).

Balancing Resources with Expectations

Doing More with Less

During the last five years the Library has experienced a loss of resources and staff.. Deep budget cuts for two years and a flattening of the budget for several more years have placed the Library in a maintenance mode in terms of its collection. However, the major impact for the budget decreases has been from the loss of staff due to reductions in the workforce as well as the elimination of vacant positions. With the loss of over 25% of its staff including all student workers, the Medical Center Library has had to struggle with increasing workloads while continuing to deliver innovative, flexible and customized services to its clientele. This balancing act has led the Library to the point of asking what it should and should not be doing for the Duke medical community given its limited resources.

By holding a number of mini-retreats on emerging trends and critical issues within the Library and the profession, the staff delineated some key factors that need to be considered and addressed as part of its planning for the future.

Why Not the Status Quo

- o Not all places and patrons are being served as well.
- o Structure in place is not pro-active, but reactive.
- o There are lots of competing priorities – example, hours spent with a student on a class project vs. the in-depth assistance needed by a faculty member working on a grant.
- o People have asked for help and know how to ask for it.
- o Lack of a consistent approach to services and meeting needs – different library staff provide different levels of service to patrons.
- o Few parameters or limits around services and to whom they are delivered and at what level. For example, what level of service do we offer the general public?
- o Visibility of Library/Archives staff needs to be increased.
- o The Library's value to the institution needs to be more evident if it is to stay healthy and survive financially difficult times.
- o The Duke community may not fully appreciate what the Library's health information professionals can do for them and the institution.

Impact on Duke Medicine

The Library staff then discussed our role at Duke and what impact we, the Library & Archives staff, can have on Duke Medicine. Our conclusion was that through our special library and information knowledge, skills, and expertise we can find relevant resources that influence clinical decisions, enhance learning, and support advanced research. In summary, the Library and librarians can do the following to make a difference at Duke:

- o Improve patient care,
- o Improve education, and
- o Improve research.

But how do we do these things? We identified two critical roles for libraries. We can improve access to information by:

- **building the technical systems** that provide easy and reliable access to relevant information, and
- **building the people systems** that make finding and using that information easier.

In the case of technical systems, the Library often has less control over this. The producers of electronic resources and the managers of campus networks often determine the ease and reliability of access. However we do have control over the people system, i.e. the staff, who makes resources, services, and ultimately information available to all users.

- o Teaching information management, retrieval, and evaluation skills.
- o Expert searching and retrieval of the literature and information through an in-depth knowledge of database structures, metadata, search engines, and interface.
- o Making information easier to find by selecting, evaluating and organizing it.
- o Promoting the information resources and services available to the Duke community.

Serving Diverse Users

The Library also grappled with the sheer size of the population of Duke Medicine and how to reach and serve all those diverse user groups. As the discussions unfolded, the professional staff took a hard look at our patrons and realized not everyone would come to the Library, whether in its physical or virtual form.

- o Those who will never want to use us -- they have either the necessary skills or knowledge, or are unaware of how we might help them.
- o Those who are not aware of us – patrons forget there is a library here to serve them and rely on the Internet and colleagues instead.
- o Those who are aware of us, but still do not use us -- it may be a convenience factor or simply a preference for self-reliance, doing things on their own.
- o Those who really need us and are using us! They walk into our library, email, call on the phone, or stop us in the hall and are seeking the help they need.

We then asked ourselves which groups would be the most effective to reach? What would be the best use of Library time and resources? Trying to convert biblio-phobics? Or working with those who want and need our assistance? For librarians, this is a difficult train of thought since the profession's values are to reach everyone and make them understand the importance of the library. The dilemma is the Library could also spend a great deal of time and resources trying to transform people to bibliophiles, instead of focusing on those already asking for help.

Triaging Information Needs

As a result of these questions and discussions, the Library began to think differently about patrons and their needs. Perhaps the Library staff should give up on the impossible task of being everything to everyone and concentrate on those that need us. One suggestion was to approach patrons as if we were in the ER and triage them into different categories.

- o Those who will die with or without treatment; these users will not use the Library no matter what we do. While we can continue to make them aware of our services, we are unlikely to “cure” them.

- o Those who are easy to treat and will survive; they use the Library regardless of what we do. This group is already taken care of since they are in the Library or contacting Library staff; they are part of our daily operations and will be served without additional effort.
- o Those who need to be treated; these patrons may be aware of the Library and its services and resources, but require more diagnoses of their information “disorders” and interventions to help them find and use the best information. The Library and its staff can make the biggest difference with this group.

During these discussions, another set of critical concepts emerged – the diversity and difference among the user groups that comprise Duke Medicine. The Library staff had heated discussions about what services and resources should look like. It became clear that different groups with different institutional roles needed different levels of services and resources from the Library, i.e. what is considered to be an essential service for a student may not be needed by the expert researcher in basic sciences. Through further discussions the Library realized more clearly that not “one size fits all” or one type of service meets everyone’s needs.

User Service and Resource Needs

To help sort out the different service and resource needs, the Library created a matrix of user groups and their characteristics as well as their information needs. Instead of using the usual categories of student/learner and faculty, or departments and disciplines, the Library found that describing users by their roles within the mission of the institution provided a better analysis of their characteristics, in terms of information needs, and the type of services and resources that the Library should provide.

Education /Teachers/Learners

Primary focus: Duke Medicine (SON, SOM, graduate) students and faculty.

Characteristics: want customized courses; drop into the Library to use services and seek advice; some learners who are building skills and knowledge.

Key services: Teaching; customized instruction; scheduled training sessions; coordination of curricular and educational events; and training through consultation sessions.

Clinical Patient Care

Primary focus: house staff, clinical faculty, hospital staff, patients at Duke, and other health system members.

Characteristics: Fast access to clinical information; assistance with searching; time sensitive response to requests; easy to use resources; less likely to come to library; more remote use of resources and services.

Key services: Mediated searching; pre-selected Web-based resources; teaching; and fast and reliable remote access to both resources and services.

Research

Primary focus: faculty, students, lab and office staff, research associates.

Characteristics: Long-term research; high level experts in their field and their literature, or asked to by the expert researchers to find information; use of old literature as well as current; more self-sufficient; more power users; more internal library use; more concern about collection and

interlibrary loan services; and research staff/assistants need training in use of the Library and its resources.

Key services: Information services; in-depth consultations; organized and easy to use Web site and resources; mediated searching; training for office/research staff in how to locate information.

This analysis of our environment and clientele led to the identification of important tenets that the Library must consider as it plans its goals and strategies for the coming year.

- o Find out what users want and need.
- o Prioritize and re-prioritize as changes occur.
- o Change services as the environment changes and let older things go.
- o Identify areas where Library can make the biggest impact and contributions.
- o Change staff job duties and responsibilities to be responsive to changing needs.
- o Find alternate funding sources.
- o Fine tune marketing that has been done and should be done.
- o Look for partners in new ventures.
- o Continue to strive for the best ways to the best information.

Duke University

Medical Center Library

Strategic Goals 2006-2010

Library As Place within Duke Medicine

More effectively use the existing Library facility to support the educational missions, information management, and resource needs of the Medical Center.

Electronic resources are changing the nature of libraries and how patrons use the traditional library facility. Duke's preservation quality storage facility allows the long-term storage of older books and journal volumes thereby freeing up space historically used for stacks. The Library's location, the Mudd building, is in a central location and could be used to support a number of activities that support educational activities in addition to accessing Library resources and services. While the School of Medicine Library Space Planning Committee has made recommendations regarding the future use of the facility, the Library must continue to improve and reconfigure its space to reflect user needs and to expand its role in the broader Duke Medicine community.

Implement the Space Planning Committee recommendations

- Work with key administrators and facilities groups within the Medical Center to develop a building program.
- Work in conjunction with Financial Services and Development to submit financial plan for renovation costs, phases of the projects, and funding sources.
- Oversee renovation/construction in conjunction with Facility Design Office
- Partner with the Schools and other groups in the use of the library facility for educational activities and events.
- Develop a business plan regarding the storage and retrieval costs of older materials including the use of the Library Service Center.
- Make decisions regarding the retention, removal, storage and access to library materials.
- Identify technology and staffing needs for providing access to stored materials.
- Continue to review space needs for staff, services, and collection in relation to usage data..

Expand the use of technology and technological capabilities

- Provide more computers for patrons.
- Enhance the wireless capabilities in collaboration with Duke Health Technology Solutions.
- Explore the feasibility of having more hard-wired patron spaces throughout the library.
- Provide high tech spaces for library staff to provide individual and small group training and consultations.
- Increase access to multimedia technologies for patrons and staff by creating more multimedia spaces for scanning, Web and graphic design, and access to other specialized software.

- Investigate the feasibility of installing teleconferencing capabilities.
- Add at least one fully ADA-compliant workstation to the Library.

Create better meeting spaces

- Explore the feasibility of removing walls and creating larger and more flexible conference rooms.
- Install computers, projectors and other technologies to enhance the use of the existing conference rooms for staff meetings, projects, and patron groups.
- Continue to evaluate, restructure and improve staff work-spaces as needed.
- Rearrange offices to ensure appropriate work and communication flows occur within units and the overall library.
- Ensure that all Library staff members have ergonomic workstations and equipment that meet their work needs.
- Identify ways to provide a home for Archives within the Library or on the medical center campus.

Improve and provide more inviting social spaces

- Create more comfortable spaces with softer and more inviting furniture.
- Ensure that there are a variety of spaces that accommodate different levels of noise, from quiet study to conversational areas.
- Continue to explore the implementation of a full coffee shop within the facility.
- Build flexibility into all spaces so that they can change over time or be restructured for special events.
- Review current signage and develop plans for creating accurate and clearer directional information.
- Create more exhibit spaces for Duke materials and art in collaboration with the Schools and Cultural Affairs.

Focus on Content and not the Container: Redefining the Library Collection and Resources

Conduct more in-depth research into information needs and behaviors of the Duke community to guide a new vision and a realignment of the collection development plan, concentrating on resources that leverage new technologies, while ensuring the collections are vital and relevant to Duke's priorities and initiatives.

New electronic resources are changing how information is delivered and used by researchers, clinicians, and students. Patrons' expectations, utilization and information-seeking behaviors have changed radically in the electronic environment. Further research is needed to identify those changes and the specific need for additional or different resources. Faculty, researchers and students are expecting access to new electronic resources. Rising costs of electronic resources, including journals, will continue to outstrip the standard inflationary increases for the budget. Print will not completely disappear for many years. With limited funding, the selection and continuance of information resources must reflect the core needs of the institution's educational, patient care, research, and administrative missions. In addition the Library needs to explore how it can create information resources, such as databases, that enhance commercial resources and address Duke Medicine's unique information needs.

Identify how Duke patrons are using resources

- Collect and analyze data on current electronic resources, identifying patterns of use.
- Develop additional methods for collecting data on both print and e-resources.
- Study use of print and electronic materials for a one-year period to identify key subject areas and less utilized materials.
- Conduct structured evaluations of existing and new resources, involving key experts and library user groups in the review process.
- Conduct focus groups of faculty, students and staff.
- Identify ways to create on-campus resources and databases that augment commercial resources and support faculty and student information needs.
- Develop mechanisms for seeking more regular input from patrons into collection decisions.
- Provide patrons with a testing and feedback zone on new and proposed resources.

Assess collection in terms of new strategic plan

- Review the strategic plans developed by other units and identify new and changing projects and programs.
- Identify gaps where new information resources, services, and databases need to be developed/created, effectively using technologies, to support Duke Medicine activities and information needs.
- Identify a core collection of materials that must be maintained throughout the ebb and flow of new initiatives and programs.
- Balance new and existing resources through regular re-evaluation of the strengths and weaknesses of the collection and specific information tools.
- Re-negotiate contracts as they expire to cover all health system members at a reasonable or marginal cost and achieve alignment within information services.
- Build a stronger collection in the areas of public and global health to support international initiatives.

Continue to move to more immediate access through digital resources

- Move more materials to electronic formats, when available and cost-effective, to improve access.
- Support patrons' preference for electronic access for quick reference, while maintaining print textbooks and reference works for more in-depth reading and research.
- Preserve access to non-print materials to support research realizing that the last 25 to 30 years of print literature will continue to be important.
- Provide access to more Web-based multimedia programs and sets of digital images for teaching and learning, while phasing out the older audiovisual formats.
- Monitor, assess, and promote the development and implementation of new information tools that integrate diverse e-resources and organize information for the user.
- Address the issues of ongoing access and preservation to electronic materials through initiatives such as content management systems, digital repositories, and archiving systems.
- Store archival and lesser used print materials in off-site storage when feasible.

Implement new tracking and funding models to support resources

- Develop and implement more precise internal systems for tracking, reporting and projecting costs so that purchases can smoothly occur throughout the fiscal year.
- Identify and develop new funding models for sharing costs with other units within Duke Medicine and the campus.
- Participate in collaborative purchases and collection development with campus libraries and local consortia.
- Work with other Duke libraries in obtaining a centralized university fund for commonly shared e-resources.
- Propose an approval process for new university programs that requires an assessment of the costs of library, information, and archive resources and services that support them.
- Assess and make the School's administration aware of the impact of flat budgets on the ability to maintain core resources and services.
- Implement tracking systems for contracts and electronic resource renewals.

Information and Services at the Point of Decision-Making and Learning

Access to the best information will be achieved through a combination of patron-driven technologies and personalized library services that provide seamless, familiar, and immediate links to high quality and relevant biomedical information.

The volume of medical information, electronic resources and databases has made information use and management more complex. End-users often need assistance in identifying the most relevant tools as well as training in effective searching techniques. The Library staff must move beyond the walls of the Library and take services to the user. The Library will be able to address the dynamic and ever changing DUMC/SOM information needs by working with the faculty to identify tools that are being used, recommending additional relevant resources, providing training in information skills, and changing the selections of services and resources delivered to a department as needed.

The library field is exploring new roles, such as the informationist and information-specialist-in-context, which merge the expertise of the information specialist with the subject specialist to deliver relevant information and services at the point of need. A key question is whether a single approach will meet the needs of users in differing fields and settings. Given limited human resources within the library, a team-based approach may be as valid and more cost-effective, especially in the research and teaching environments. Web-based technologies must also be used to assist with the identification, organization and just-in-time access to relevant resources, services, and online training. The Library must determine which models or new structures work best within the Duke Medicine environment.

Identify and implement new approaches for delivering information

- Research new concepts such as the informationist and identify components that would strengthen, improve, and enhance information access within Duke Medicine.
- Identify possible team-based approaches, such as the “swat team”, for working with specific disciplines.
- Propose relevant information service models and test them through pilot projects in departments.
- Restructure existing information services, such as mediated searches, and develop pilot projects that can be tested and evaluated.
- Identify the unique information needs through focus groups and surveys.
- Create customized tool sets on the Web for the various user groups/disciplines based on direct input from departments and schools and usability studies.
- Develop online tutorials for just in time training of basic informatics skills.
- Maintain a robust and effective Web site through databases and content management systems.
- Implement a responsive, barrier-free, and cost-effective service for accessing print materials that are located in off-site storage.
- Investigate the use of new technologies such as blogs, wikis, and podcasts, in the delivery of resources and services.
- Explore the skills and training needed for librarians to competently provide more advanced information services, such as filtering and summarizing the literature.
- Implement evidence-based library practices in committee and task force work.

Recognize and define reference services as the gateway to other services

- Define what constitutes “core reference services” that any walk-in patron should receive.
- Identify the higher level services that are and should be offered to the primary clientele.
- Continue to offer the more focused and personalized consultation services.
- Provide adequate training for service desk staff in the basic reference interview and referral techniques.
- Continue to evaluate the on-call reference service.
- Survey patrons about the levels of service and their satisfaction with the service desk and reference services.
- Revisit the use of instant messaging, chat and other technologies for providing virtual reference services, including the possibilities of partnering with other health sciences libraries across the country and world.
- Promote the value of the librarian in assisting patrons with the use and access to digital and print information sources.

Provide a responsive education program

- Teach thought processes and cognitive skills involved in information retrieval in addition to technical, critical thinking, and reasoning skills.
- Keep users abreast of new resources and tools, exploring the use of new methods and technologies for alerting patrons to changes and the introduction of new resources.
- Customize educational sessions to fit individual or group user needs.

- Integrate information management skills and training into curricula by working with the Schools on assessing the current curricula, proposing new courses, and being responsive and flexible when new opportunities are presented.
- Identify when just-in-time approaches, such as online tutorials, will suffice and when live sessions are required.
- Investigate the use of Blackboard, Blue Docs and other Web-based technologies for delivering educational content.
- Continue to be a leader and partner in the promotion and implementation of evidence-based medicine and training throughout Duke.
- Identify and approach champions of informatics, information management, and EBM within departments, divisions, and other units and build collaborative relationships with them for developing and delivering educational programs.
- Continue to educate learners, faculty and staff about scholarly communication and intellectual property issues, which are increasingly important in the digital environment.
- Offer a platform for authors to mount copies of their articles (as approved by the publishers) on a local institutional server to support access.

Achieve easy access to all information resources

- Work with other Duke libraries on common interfaces, such as Metalib and SFX, that search across and link together various databases and information resources, both internal and external to the Library.
- Implement and maintain features that link citations to full-text information.
- Seek out and evaluate new interfaces, such as Endeca and Scopus, which present search results in relevant and innovative ways.
- Work with DHTS on implementing knowledge-based resources that link directly to patient care records and bring concise information to the point of decision-making.
- Continue to work with DHTS and OIT on easy and seamless remote access to online resources provided by MCL and the University.
- Assess the need for customizable and personalized interfaces and seek out new technologies and approaches that would address those information needs.

Improve the quality of searching done at Duke

- Review the current structure for offering mediated search services and determine if it is feasible to lower or eliminate the barriers to expert searching.
- Identify the areas where expert searching by library staff might have a major impact on the quality of health care and research and develop pilot projects for offering those areas free searching.
- Continue to provide educational sessions on search techniques and core medical databases to students, teaching them the skills of retrieving and evaluating the literature.
- Provide consultation and individual training sessions to faculty who seek assistance with searching or have complex search needs.
- Develop a training course for office and research assistants who often conduct searches or seek out information for their faculty.
- Plan and implement a promotional campaign on the importance of good searching in clinical care and research.

Respond to the growing number of global initiatives

- Identify the services and resources that can be extended to Duke faculty and students in global locations, including Singapore, Tanzania and other foreign countries.
- Compare and assess the resources available at Duke to those available in Singapore for the Graduate Medical School.
- Share our expertise and educational materials with sister libraries in Singapore and other countries.
- Increase awareness of our faculty and students of the programs and resources freely available to developing countries.
- Identify international resources that will support Duke's initiatives.

The Library Staff – Making the Library More Than A Collection And Facility

A highly trained, knowledgeable, and skilled Library staff are what connect the faculty member, student, researcher, and staff member to the highest quality medical information.

The Library staff is what makes the library more than simply a collection of books and journals or a Web page of thousands of electronic resources. It is the Library staff's experience, knowledge and skills that bring information in an organized and usable manner to the campus, offices, research labs, and clinical settings where decisions are made. In addition to their crucial roles of selecting, evaluating and organizing resources, they are now educators in the use of technologies and information tools, and how to effectively use new resources to find the best evidence. As with electronic resources, the Library staff can no longer be bound by the physical walls of the building. They must be outwardly focused, bringing services to where the users are located, and scanning the environment for new technologies and trends that must be integrated into library services. The health of the Library and its services and resources, depend on training, recruiting and retaining the best staff possible.

Increase outward focus and activities of the staff

- Assign staff to assess specialized information needs and create services and training that address those needs.
- Realign staffing patterns and skills to support priority services.
- Develop stronger research skills through evidence-based practice techniques among our staff to support evaluation and outcome studies and collaborative projects with other departments.
- Encourage all staff to become more involved in University and SOM committees and initiatives.

Ensure staff has skills for a technology intensive environment

- Develop and strengthen information technology skills in all staff.
- Ensure that staff have attained basic information technology competencies.
- Inventory existing skills within each position and identify areas where more training is required.
- Identify future skills that will be needed in the Library and provide relevant training.
- Ensure that staff remains current in the application of new technologies to information management.

Provide a work environment that supports each staff member

- Provide documentation through policies and procedures in every department and ensure they are up-to-date to support effective operation, decision-making, and problem solving.
- Emphasize customer-service skills and attitudes.
- Focus on creating strong internal customer-service, communication and teamwork among all staff members.
- Cross-train staff between Library units to enrich the work experience and provide better cross-coverage
- Maintain motivation and morale of staff during difficult budget times and restricted resources.
- Ensure that all job descriptions fully and accurately reflect the skills and knowledge needed by a position.
- Promote and fully implement the Performance Evaluation Plan behavioral guidelines as the standard expected for all library staff.
- Promote innovation and creativity in designing and implementing services within a constrained budget.
- Create a plan for quickly recognizing achievements, creativity, good work, and team effort.
- Retool staff to meet the changing information services environment.
- Continue to support and expand social and celebratory opportunities.
- Seek out more opportunities for collaboration with colleagues across the campus and across the state.

Identify more efficient approaches to work

- Explore the use of technologies for strengthening and improving internal communications.
- Restructure meetings so that they are efficient and outcome oriented.
- Implement evidence-based practice into all projects.
- Use project management techniques for all major projects and new initiatives.
- Continue to foster an open environment that encourages constructive criticism and the expression of differing opinions.
- Implement new systems, software, and approaches that streamline or simplify work.

Develop the leaders of tomorrow

- Provide management and leadership training for staff interested in those career pathways, as well as those in supervisory and management roles.
- Support mentoring programs and opportunities for librarians.
- Provide staff with opportunities to develop and enhance skills by assigning responsibility for special projects and initiatives.

Underlying Assumptions

Strategic plans are by nature designed to identify the major goals and strategies for being successful in the future. These plans cannot begin to address the myriad number of ongoing issues, resources, and services that are part of the daily operations of a library. Underlying all the new strategies are basic assumptions about resources and activities that would need to be in place to support future endeavors. Many of these are ongoing functions or resources are essential to library operations and its success in proactively supporting its clientele. What follows is a description of the core underlying assumptions that form the infrastructure for the strategic plan.

- ***Strong collections*** must be maintained to support the diverse administrative, educational, clinical, and research information needs within Duke Medicine. The Library will:
 - Continue to acquire current journals, books and other relevant publications in paper and electronic formats as appropriate.
 - Provide access to major health databases and online resources.
 - Preserve older materials to support longitudinal and historical research activities.
 - Acquire multimedia and teaching materials as requested by faculty.
 - Explore the delivery of information through new technologies.
 - Coordinate services and purchases with other libraries on campus and in the region.
 - Offer services that identify, locate and acquire materials not held by Duke.
 - Serve as a resource library for medical information for hospitals and health agencies within the state and regionally.

- ***Funding and development work*** are crucial to the success of the Medical Center Library. The Library will:
 - Obtain sustained funding from School of Medicine and Duke Medicine to support core programs and research priorities.
 - Address the impact of new initiatives and educational programs on library resources and budget.
 - Search for endowment funds to support key programs and resources.
 - Develop a plan for acquiring funding sources to support new services and activities.
 - Seek grant proposals from key funding groups and foundations to support special library projects.
 - Explore additional revenue opportunities through fee-based services.

- ***Collaboration, cooperation and partnerships*** are essential for future growth and enhancement of services and resources and to generate support and funding for library-related programs. The Library will:
 - Provide access to Duke and Triangle Research Libraries Network (TRLN) library collections through system-wide agreements and services.
 - Coordinate collection development among Duke libraries and with TRLN to maximize availability of resources with minimal duplication.
 - Partner with departments, schools, and other libraries to share the cost of new resources.

- Create collaborative agreements with departments and schools to expand expertise and skills available to library and patrons.
 - Strengthen the outreach and marketing programs to ensure regular flow of information about needs and resources between the Library and departments, programs, and schools.
 - Identify opportunities for additional collaborative relationships in order to develop special initiatives.
 - Negotiate consortium licenses for electronic resources and databases whenever possible.
- ***Outreach and marketing*** must be part of all Library services to ensure that our clientele are aware of the services and resources available to them. The Library will:
 - Produce newsletters, Web announcements, handouts and traditional public relations materials to inform customers of new services, resources, and issues in the Library.
 - Create exhibits highlighting new or special services.
 - Host special events that showcase and demonstrate the Library's offerings.
 - Offer demonstrations, tours, and customized introductions to the Library.
 - Explore a variety of methods and technologies (Web, e-mail, handheld devices, blogs, etc.) to effectively communicate with customers.
- ***Assessment and evaluation*** of what we do, how well we do it, and customer satisfaction must be ongoing. The Library will:
 - Conduct general and special customer satisfaction surveys on a regular basis.
 - Collect and evaluate statistics from electronic resources, service desks, and other sources.
 - Seek input on new directions and programs through advisory and focus groups, requests for specific feedback, and other forums.
 - Develop research projects to determine the usefulness or effectiveness of programs and resources.
 - Appoint Librarians to key Duke Medicine and Duke University committees and task forces in order to anticipate needs, seek feedback, and discuss issues.
- ***New and proven technologies*** must be implemented in order to maintain and enhance access to information resources and services. The Library will:
 - Maintain strong systems and networks to support internal use of resources and technologies.
 - Ensure a strong and easy to use gateway to Web/Internet resources and services
 - Ensure that remote access to resources is sustained and strengthened by campus-wide and library-based services.
 - Work with DHTS and OIT in the use of wireless technologies for users and library staff.
 - Promote the use of new technologies that enhance access to educational and knowledge-based resources.
 - Explore new technologies in order to determine their effectiveness and related support and policy issues.

- Beta test and critique new products and devices in order to influence future developments in the commercial sector.
- Build strong relationships with DHTS, Medical Informatics and other groups focusing on technological developments.
- Champion the integration of information resources and technologies into the clinical, educational, and research environments.

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