Health Sciences Library External Review

Health Sciences Library Self-Study

Liz Bayley, Director

October 9, 2012
## Contents

Overview of the Faculty of Health Sciences ................................................................. 1

Overview of the Health Sciences Library ........................................................................ 1

  Vision and Mission .................................................................................................. 1

  Strategic Planning .................................................................................................. 2

  Key Indicators ........................................................................................................ 3

Funding ..................................................................................................................... 3

Staffing ..................................................................................................................... 4

Space ........................................................................................................................ 5

Services .................................................................................................................... 6

Collection ................................................................................................................. 6

Support for Education ............................................................................................... 7

Support for Research ................................................................................................. 7

Previous Reviews ....................................................................................................... 8

Collaboration with McMaster University Library: ...................................................... 9

Collaboration with Local and Regional Health Libraries ........................................... 9

Strengths and Challenges ........................................................................................... 10

Appendices .............................................................................................................. 11

  Appendix A: Health Sciences Library Vision, Principles, Values, Mission and Goals .......... 11

  Appendix B: Health Sciences Library Plan ................................................................ 13

  Appendix C: Key Indicators .................................................................................... 14

  Appendix D: Organization Charts .......................................................................... 16

  Appendix E: Status of Response to Recommendations from Health Sciences Library External Review conducted by Michael Ridley, August 2002 ................................................................. 22

  Appendix F: Operational Review of the Health Sciences Library: Executive Summary and Key Recommendations ................................................................. 24

  Appendix G: Building an Academic Health Sciences Library Network ...................... 26
Overview of the Faculty of Health Sciences

McMaster University is one of Canada’s top research-intensive universities and the Faculty of Health Sciences is a major contributor to this, with more than $100 million in research funding overseen by health sciences investigators. The Faculty’s educational programs include schools of medicine, nursing, rehabilitation science, midwifery and the unique Bachelor of Health Sciences Program. These programs are known worldwide for their innovations in education, emphasizing small group, problem-based, self-directed, lifelong learning. Graduate studies include a wide range of medical residency programs and master’s and doctoral level training.

The Faculty of Health Sciences is a large and complex enterprise. It:
- Receives 60% of McMaster’s research funding (over 80% if hospital partners are included);
- Receives only half of its operational funding from the Ministry of Training, Colleges and Universities;
- Enrols 27% of the University’s graduate students, not including 882 medical residents; and 86% of the students in joint graduate programs;
- Employs 49% of the full-time faculty, not including over 2000 clinical faculty;
- Offers an undergraduate medical program across 3 sites and a collaborative undergraduate nursing program in conjunction with 2 community college partners;
- Provides distance learning options for many graduate and diploma courses;
- Works in an environment of distributed learning (most faculty and students are not at McMaster campus) and distributed research (much of the research is carried out in clinical settings).

More information on the Faculty can be found at http://fhs.mcmaster.ca/main/welcome.html

Overview of the Health Sciences Library

The Health Sciences Library (HSL) reports directly to the Faculty of Health Sciences, through the Associate Vice-President (Academic). It is located in the Health Sciences Centre, which also contains the McMaster site of Hamilton Health Sciences, the largest teaching hospital in the city. The hospital is a separate institution and the HSL has a contract to serve as the library of the McMaster site of the hospital. The HSL also serves as the resource library for all healthcare institutions and practitioners in the area and runs the network office for the members of the Hamilton & District Health Library Network.

Vision and Mission

VISION

Our users will have the skills, support and resources required to access the information they need
A copy of the HSL Vision, Principles and Values and its Mission and Goals is attached as Appendix A, and are also available on the HSL website at:

http://hsl.mcmaster.ca/about/vision/index.html
http://hsl.mcmaster.ca/about/mission/index.html

Strategic Planning

Strategic planning is carried out by all HSL librarians, who serve as the Management Committee. It begins with a Management Retreat in August of each year with the identification of priority projects for the coming academic year and project leads for each. Projects are updated in January at the beginning of the Winter term. A list of the Fall 2012 Projects is attached in Appendix B.

In all instances, these projects are tied to the priorities identified by the Faculty of Health Sciences and to those of McMaster University.

The Faculty of Health Sciences Strategic Planning (http://fhs.mcmaster.ca/main/planning.html) has identified four strategic planning themes:

- Commitment to innovation in learning and discovery
- Sustain an enabling culture consistent with FHS tenets
- Advance FHS influence and leadership profile locally and globally
- Ensure fiscal strength and stability

As a key partner in meeting the academic mission of the Faculty, HSL ensures that the resources and support are provided as effectively and as efficiently as possible to allow students and faculty to complete their work. Because the user base is increasingly dispersed geographically and works beyond regular office hours in most cases, innovation in the use of technology to deliver resources and services has been critical.
The current priorities for McMaster University (http://www.mcmaster.ca/presidentsoffice/priorities.html) were outlined by Dr. Patrick Deane, President and Vice-Chancellor in his Forward with Integrity: A Letter to the McMaster Community and have been summarized as:

- Student Experience
- Community Engagement
- Research
- Internationalization

Task Forces were formed to discuss each priority and to develop a position paper. HSL librarians served on two of the task forces: Student Experience and Research. As a result, the Fall 2012 projects reflect these priorities. Additional information can be found in Support for Education and Support for Research below.

**Key Indicators**

The Health Sciences Library submits detailed statistics to the Association of Academic Health Sciences Libraries for publication in the "Annual Statistics of Medical School Libraries in the United States and Canada". Comparisons with 127 North American medical school libraries show that in 2010/11 the McMaster Health Sciences Library was:

- 2nd busiest in number of physical visits;
- 3rd heaviest in use of the physical collection (in house and signed out);
- 96th in terms of the number of librarians.

Charts of key indicators can be found in Appendix C or on the HSL website at: http://hsl.mcmaster.ca/about/mission/reports.html

Entrance surveys carried out in October 2011 and March 2012 show that the majority of visitors to the Health Sciences Library are McMaster students and, of those, two-thirds are from other Faculties beyond the Faculty of Health Sciences. The survey will be repeated in November 2012.

**Funding**

While the Health Sciences Library receives a portion of the central University funding for McMaster Libraries (historically set at 18%), it is subsidized by the Faculty of Health Sciences with 25% of its budget coming directly from the Faculty. Rising costs of resources, salaries and benefits combined with flat-lined base funding have resulted in budgeting challenges.

In line with the mission-based budgeting philosophy within Health Sciences, in 2008 HSL developed a cost-centre budget model, and recommended that incremental costs it could not
absorb within its budget envelope be allocated to academic departments. The cost allocation was based upon a blended formula that considered both research and education cost drivers. The costs were allocated to the academic departments so that they could decide how to reallocate these costs internally. This incremental cost allocation model was approved for implementation in 2009/10 for one year, with continuation pending review in 2010/11. In the end, the Dean agreed to identify alternate funding to help cover deficits in the information resources budget, as the Library’s rich electronic collection was seen as essential to the ongoing excellence and innovation of the Faculty’s educational and research pursuits.

To help offset increases in salaries and benefits, Faculty of Health Sciences educational programs were approached to provide direct funding of liaison positions. At present, five out of six librarians and the liaison assistant receive full or partial funding from the programs they support.

- School of Nursing: Liaison Librarian fully funded
- School of Medicine: Liaison Librarian 80% funded; Liaison Assistant fully funded
- Bachelor of Health Sciences Program: Liaison Librarian fully funded
- Postgraduate Medicine: Liaison Librarian 50% funded
- Midwifery Education Program: some funding provided
- Physician Assistant Education Program: some funding provided

The one major exception is the School of Rehabilitation Science which provides no funding for the support it receives and values greatly. This is due to the major challenges of the funding structure for all graduate programs. Support for graduate education is an ongoing issue, one that is recognized by the programs and by the Library.

Donations have been sought to cover other operational costs. The School of Nursing has sponsored the replacement of all public computing equipment in recognition of the fact that their students are heavy users of the Learning Commons in the Library. A donation from the McMaster University-Hong Kong Foundation resulted in the naming of our Circulation Desk and funding for the upgrade of Library facilities. Fundraising is a priority and the HSL will work with the Faculty of Health Sciences Director of Advancement to prepare funding proposals. (see Appendix B, Project #8)

**Staffing**

After dropping from 30 to 26 positions between 2002 and 2008, staffing numbers have remained fairly constant over the past four years despite major growth in the size and number of educational programs offered by the Faculty of Health Sciences.

One result of the Operational Review carried out in 2008-2009 was a new organizational structure, in particular with all librarians reporting directly to the Director. In 2010-2011 the job descriptions for most library staff positions were rewritten to reflect changing needs and
responsibilities. A new position, Supervisor – Circulation and Collections Maintenance, was created and staffed as of January 16, 2012. This position had been eliminated in 2009 when the incumbent retired; however, the staffing and systems complexities of the area required dedicated, hands-on management.

While the organization chart shows the formal reporting structure in the HSL, many of the staff support functions in more than one area of the Library. The Circulation Desk and Information Desk are treated as service points which are covered by staff from several departments. In addition, a team approach has been used to coordinate the liaison program and research support.

Appendix D includes a chart of the current functional teams and Organizational Charts from 2002 to date.

Staff absences and leaves have meant that on many occasions the Library has been stretched to cover its service points. This has been even more difficult this fall with the reduction in funding to support student assistants.

The professional librarian complement is already well below that of other academic health sciences libraries. Administrative overhead has been kept low by having all managers take on liaison and front line responsibilities; however, this has resulted in stress to the managers and their staff as the demands and priorities of these responsibilities take time away from internal communication, staff training, project planning and administration.

**Space**

The Health Sciences Library completed a major physical renovation in spring 2007. The focus is now on “people space”, with a variety of areas designated for quiet/silent individual study and for group study. For the most part, the renovation has been very successful.


The physical library space is heavily used and does not have the capacity to greatly expand user seating. Although a photocopy room was converted into an FHS graduate student study room, there are times when every seat is filled and students are sitting on the floor. The demand for group study rooms is constant, especially with expansion in programs and numbers of students being expected to do group work. The open design has made noise containment a constant issue.

This Fall the HSL is planning a “Share the Space” campaign to help foster good behavior around sharing space. It will focus on noise, food and garbage.
Services

As mentioned earlier, the HSL uses a team approach to staff its Circulation and Information Desks. Usage of these service points is constantly monitored to adjust the level of staffing during the day and through the week.

Hands-on training is offered in the eClassroom, with general classes for database searching and citation management and specific classes to meet curriculum needs.

While the number of reference questions has been decreasing, their complexity has increased and the Library needs better measures of what is happening at the Information Desk.

Additionally, more support is being offered through consultations with the liaison librarians in their offices. The important role of the librarians in supporting the educational outcomes of students has been recognized by the students and by faculty, resulting in heavy use of the liaison program. This is also an area where better measures and analysis is required.

The HSL offers Interlibrary Loan and Document Delivery, and is investigating ways to enhance this service with the implementation of Relais Express (see Appendix B, Project #5).

As teaching and learning moves increasingly to distributed and distance learning, the HSL has attempted to provide virtual services. The Website has been redesigned, a team has been formed to help faculty to set up proxy access to resources, full use is being made of educational and communications technology, online tutorials have been developed or identified, and online resources are preferred.

Collection

The move to electronic information resources has been a priority and is highly valued by teachers, learners and researchers. Consortial licensing, both at the provincial and at the national level, has greatly increased the number and variety of resources available. However, the costs to maintain these licenses have increased and have resulted in a major and growing portion of the collections budget being allocated to the large licensed packages.

Students in particular still want a focussed print collection. Therefore, the HSL has identified a core collection of books which it updates regularly. The portion of this collection identified as essential by the medical students has been replicated at the distributed medical sites in Waterloo and St. Catharines. The Niagara Regional Campus of the Undergraduate Medical Program moved from St. Catharines General Hospital to Brock University in August/September. The print collection has been re-processed and added to the Brock Library catalogue and collection; that Library will provide circulation and ILL pick-up services, but any training, document delivery or reference will still be provided by McMaster Health Sciences Library.
The Library is moving to a patron recommendation model for any print book titles outside the core collection. Interlibrary Loan requests will be monitored and patrons will be encouraged to make recommendations for books. More publicity on this method of building the print collection is needed.

The Health Sciences Library also has a rich archival and historical collection. A recent project has been to better integrate these resources into the curriculum of the educational programs.

**Support for Education**

The educational liaison program is very successful and valued by faculty and students alike. Liaison librarians have been assigned to all major health education programs and the responsibilities of a library assistant have been refocused on liaison support.

There are some major challenges in supporting education:

- Distributed and distance learning require different delivery methods and skill sets;
- Undergraduate programs are growing in number, with an increased emphasis on independent learning and research;
- Graduate programs are growing, both in numbers of students and variety of subjects;
- One focus of student research is extensive literature searching, with an emphasis on systematic reviews.

The HSL is working with the members of the Hamilton & District Health Library Network to vision and plan an Academic Health Sciences Library Network which will support teachers and learners in their clinical settings.

The HSL submits budget needs when new programs are being approved. However, resources to support students in their effective use of the research literature are limited. Without the addition of more librarians, especially to support graduate students, the level and quality of support is not sustainable.

**Support for Research**

The rich collection of licensed electronic resources, databases and journals in particular, has greatly enhanced the ability of researchers to access the literature to support their endeavour. Proxy access through LibAccess brings this literature to their desktop. However, as more research is undertaken by the hospitals or jointly by the hospitals and the university, licensing restrictions limit access to non-McMaster research team members. Unclear distinctions on institutional affiliations make the task of supporting and indeed defining the user community very difficult.
Decreased research funding is a concern, as access to the literature is a key component of research overhead. 20% of the Federal Indirect Costs of Research (FICR) funding allocated to support the libraries comes to the HSL and is used to maintain the collection; however, while the costs of journals have increased, the FICR funding has decreased.

Determining the impact of research is essential to show the value of that research. This has been identified as a major project for the HSL (see Appendix B, Project #11).

Comprehensive literature searches or systematic reviews are now a requirement for grant applications, and many research projects in the Faculty of Health Sciences are in fact systematic reviews. In many cases, the search is carried out by a research team including faculty, medical residents and more and more frequently undergraduate students fulfilling their requirements to complete their independent research studies. The expertise of librarians to assist with these searches is recognized and actively sought; however, the demand far exceeds the capacity of the current complement of librarians.

**Previous Reviews**


The recommendations from this review were examined in 2008 and again in preparation for the present External Review. The current status of the response to the recommendations is included as Appendix E.

In 2008, an Operational Review of the Library was undertaken with the assistance of a Masters of Library Sciences Co-op student. The Operational Review had four major goals:

- to refocus library services to meet the goals of the Faculty of Health Sciences and the changing needs of its users;
- to reorganize and streamline staffing to ensure that these goals and needs are being met, particularly with the challenges of increasingly larger and more diffuse user groups;
- to make the most efficient use of staff and funding; and
- to recommend a budget model to address the projected funding shortfall

The Executive Summary of the Operational Review can be found in Appendix F. The full report is available on request. In addition, an article on the process and results appeared in a special issue on health libraries published by the New Review of Academic Libraries:

Collaboration with McMaster University Library:

In order to provide uniformity of access for all McMaster users, the Health Sciences Library shares an online catalogue and a proxy server with the University Library through a formal contract for funded support. In addition, HSL transfers funds to cover its portion of nationally and provincially negotiated licensed resources and services. We are hoping for a stronger collaboration on joint initiatives in future.

Collaboration with Local and Regional Health Libraries

The Hamilton and District Health Library Network was formed in 1970, and was one of the first of its kind in Canada. Over the years, membership changed as hospitals merged and health libraries were closed. The combination of diminished funding and the move from print collections to online licensed resources had a major effect on how the Network functioned. In recent years the main activity became document delivery, with the McMaster Health Sciences Library being the major provider of journal articles from its extensive collection of licensed resources. However, as healthcare education became ever more distributed across the region and healthcare provision became ever more evidence-based, the need for a robust and coordinated level of library support was identified both by the administration of the Faculty of Health Sciences and by the members of the Network. Starting in 2009, a strategic planning process began to re-vision the Network into an Academic Health Sciences Library Network (AHSLN). Documents from that process are attached in Appendix G.

Most recently, HSL met with the Director of the Mac-CARE, the McMaster Community & Rural Education Program (http://maccare.mcmaster.ca/). While the program focuses on distributed medical education, it is also aware of the needs of other learners in the other health education programs. A joint proposal will be developed around library support in the Mac-CARE regional sites.

The latest planning to move the AHSLN forward can be found in Appendix B, Project Plan #2.
Strengths and Challenges

Key strengths:

- Skilled and dedicated Library staff members who are responsive to patron needs.
- An active and highly skilled group of liaison librarians who are valued contributors to the Faculty’s educational programs. They are responsible for integrating information literacy and evidence-based practice into the curriculum of the programs and to ensure that accreditation standards around these skill sets are met. The liaison librarians are all fully or partially funded by the programs they serve.
- A comprehensive collection of databases, journals and books to meet the requirements of the evidence-based, research-intensive and problem/inquiry based needs of its clients. Wherever possible, electronic versions are acquired.
- A rich collection of archival and historical material to preserve and make accessible the history of healthcare training and delivery.
- Leadership in local, regional and national joint licensing of clinical and health research resources; licensing for 55% of its collection is negotiated directly by the Health Sciences Library and its partners. These consortial licenses are for material not covered by the national (CKRN) and provincial (OCUL) licensing processes.
- A completely renovated space to meet the needs of the 21st century learning environment. The focus of the design is on “people space”, with areas zoned for group and individual learning.
- Services and resources tailored to the special needs of its patrons, supporting both education and research particularly in evidence-based practice and systematic reviews.

Challenges:

- Ability to meet the support needs of a growing number of students in current and new programs, particularly at the graduate level, as they carry out their literature searching.
- Funding to cover escalating costs of resource licensing, particularly to cover evolving areas of research.
- Provision of services to geographically distributed faculty, staff and students.
- Quick response in a highly active environment with critical time requirements.

In preparation for the External Review, all staff in the Health Sciences Library participated in an exercise to identify strengths, weaknesses and challenges. Four groups completed the exercise: the librarians and three separate groups of library staff. Members of each group completed individual lists in advance of “What we do well”, “Things we could improve/do” and “Challenges we face”. The groups then met, the lists were circulated, with each attendee indicating if they agreed with an item or adding comments. The items were then compiled and ranked by a neutral staff member in order to preserve anonymity of those submitting each item. Finally, the Director extracted themes and grouped items according to those themes.
Appendices

Appendix A: Health Sciences Library Vision, Principles, Values, Mission and Goals

Vision
Our users will have the skills, support and resources required to access the information they need.

Principles
We at the Health Sciences Library:
- Provide timely and seamless access to information and services from the user perspective, regardless of location.
- Help our users to become self-sufficient, providing training and assistance as required.
- Anticipate and incorporate change and innovation as a way to enhance service to our users.
- Evaluate our services and resources continuously to ensure that they serve users effectively.
- Support the research initiatives within the Faculty with our extensive research collection and consultation services.
- Liaise with the education programs to integrate information literacy and lifelong learning skills that are essential for successful problem-based learning and evidence-based practice.
- Facilitate access to a rich collection of resources in a variety of formats, focusing on a current, evidence-based, electronic collection.
- Provide an attractive learning atmosphere for our users, whether they use the library in person or virtually.
- Collaborate with other libraries in order to enhance our collection and our services.
- Balance the needs of our different user groups.

Values
- We are central to the academic and clinical role of our institution.
- We value our role as an academic health sciences library and a resource library.
- We welcome the challenges of our mission.
- We respect and nurture the contributions of all library staff, and support their personal and professional development to strengthen service to our users.
Mission
The Health Sciences Library plans and offers information services, resources and expertise in support of the Faculty's commitment to knowledge based health care practice and life-long learning. The Library uses the best of traditional and innovative technologies to facilitate information transfer. The Library fosters excellence in health education, research and service by providing access to knowledge based health care information and an optimal learning environment. By collaborating at all levels, the Library is proactive in building resource sharing and funding partnerships.

Health Sciences Library Plans

Goals
Access Goal : To provide efficient and effective access through tools which interpret and make available health sciences and related information from library collections and other sources.

Resources Goal : To provide, maintain and produce quality information resources which support the priorities in education, research and clinical care of the community of users served by the Library; and to balance this with alternatives to physical ownership.

Services Goal : To provide services which anticipate and respond to user needs, wherever those users are located.

Education Goal: To provide learning opportunities and resources which assist users in developing efficient and effective skills in accessing and organizing information

The following elements have an impact on the accomplishment of the Library's goals:

Infrastructure: The provision of a sufficient number of qualified and motivated staff; appropriate funding; suitable and attractive space; robust and up-to-date technology.

Collaboration: The identification of partners and the promotion of collaboration for the sharing of services and resources.

Innovation: The monitoring and implementation of new ideas to improve and enhance services and resources.

Evaluation: The application and development of appropriate evaluation techniques to ensure that user needs are being met and that the Library is operating in an efficient and effective manner.

Promotion: The deliberate use and development of publicity tools to make sure users and the community are aware of the resources and services offered by the Health Sciences Library.
## Appendix B: Health Sciences Library Plan

### Health Sciences Library Plan 2012-2013 – October 5, 2012

<table>
<thead>
<tr>
<th>Project #</th>
<th>Project Description</th>
<th>Manager responsible</th>
<th>Goal(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Prepare for, participate in and respond to the Health Sciences Library External Review.</td>
<td>Liz Bayley</td>
<td>Evaluation</td>
</tr>
<tr>
<td>#2</td>
<td>Work with local healthcare institutions and the Faculty of Health Sciences to build an Academic Health Sciences Library Network.</td>
<td>Jennifer McKinnell</td>
<td>Collaboration Services</td>
</tr>
<tr>
<td>#3</td>
<td>Move appropriate web content over to LibGuides.</td>
<td>Susanna Galbraith</td>
<td>Access Promotion</td>
</tr>
<tr>
<td>#4</td>
<td>Update the Health Sciences Library staff intranet.</td>
<td>Laura Banfield</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>#5</td>
<td>Write up a proposal to re-vamp the social media committee and its mandate to include marketing the library’s resources and services.</td>
<td>Susanna Galbraith</td>
<td>Promotion Innovation</td>
</tr>
<tr>
<td>#6</td>
<td>Find ways to make the archival and historical materials available to a wider audience. Project proposals with funding opportunities will be developed (see Project #8)</td>
<td>Anne McKeage</td>
<td>Access Infrastructure</td>
</tr>
<tr>
<td>#7</td>
<td>Demonstrate the value of the Library to the institution.</td>
<td>Andrea McLellan</td>
<td>Services Access Infrastructure</td>
</tr>
<tr>
<td>#8</td>
<td>Prepare priority funding proposals for FHS Advancement.</td>
<td>Liz Bayley</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>#9</td>
<td>Redefine Interlibrary Loan services based on the implementation of Relais Express.</td>
<td>Jo-Anne Petropoulos</td>
<td>Services</td>
</tr>
<tr>
<td>#10</td>
<td>Document public services procedures and complete procedures manuals.</td>
<td>Jennifer McKinnell</td>
<td>Infrastructure</td>
</tr>
<tr>
<td>#11</td>
<td>Investigate tools or methods that can analyze data to demonstrate FHS research output and the impact of the research on a global scale.</td>
<td>Neera Bhatnagar</td>
<td>Services Infrastructure Promotion</td>
</tr>
<tr>
<td>#12</td>
<td>Update remaining staff job descriptions and all librarian position responsibility statements to ensure that they reflect current responsibilities.</td>
<td>Liz Bayley</td>
<td>Infrastructure</td>
</tr>
</tbody>
</table>
## Appendix C: Key Indicators

### External Indicators:
#### Ranking of 127 Medical School Libraries in 2010-2011 (AAHSL)

<table>
<thead>
<tr>
<th>Library</th>
<th>Gate Count</th>
<th>In-house Use of Collection Items</th>
<th>Items Borrowed from Outside Sources</th>
<th>Librarians</th>
<th>Total Staff</th>
<th>Collection Expenditures ($US)</th>
</tr>
</thead>
<tbody>
<tr>
<td>McMaster</td>
<td>672,375</td>
<td>78,113</td>
<td>3,767</td>
<td>8.0</td>
<td>29.71</td>
<td>1,692,630</td>
</tr>
<tr>
<td>Mean</td>
<td>232,222</td>
<td>16,926</td>
<td>4,290</td>
<td>10.99</td>
<td>31.06</td>
<td>1,857,743</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>139,944</td>
<td>18,952</td>
<td>4,869</td>
<td>5.41</td>
<td>15.92</td>
<td>844,294</td>
</tr>
<tr>
<td>Minimum</td>
<td>10,444</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3</td>
<td>220,582</td>
</tr>
<tr>
<td>Maximum</td>
<td>681,237</td>
<td>92,215</td>
<td>29,295</td>
<td>27</td>
<td>96.75</td>
<td>4,264,190</td>
</tr>
<tr>
<td>McMaster's Ranking</td>
<td>2 (out of 112)</td>
<td>3 (out of 126)</td>
<td>48 (out of 125)</td>
<td>95 (out of 127)</td>
<td>54 (out of 127)</td>
<td>62 (out of 125)</td>
</tr>
<tr>
<td>McMaster's Ranking in 2009-2010</td>
<td>2</td>
<td>3</td>
<td>36</td>
<td>96</td>
<td>62</td>
<td>46</td>
</tr>
</tbody>
</table>

**Internal Indicators:**

**Organizational Statistics**

(2011-2012 statistics currently being compiled)

<table>
<thead>
<tr>
<th>Collections</th>
<th>2006-2007</th>
<th>2010-2011</th>
<th>2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current journal titles (all formats)*</td>
<td>4,202</td>
<td>4,648</td>
<td></td>
</tr>
<tr>
<td>Current journal titles - electronic</td>
<td>4,026</td>
<td>4,467</td>
<td></td>
</tr>
<tr>
<td>Current journal titles - print</td>
<td>n/a</td>
<td>271</td>
<td></td>
</tr>
<tr>
<td>Current book titles (all formats)*</td>
<td>56,917</td>
<td>57,350</td>
<td></td>
</tr>
<tr>
<td>Book titles - electronic</td>
<td>1,103</td>
<td>2,136</td>
<td></td>
</tr>
<tr>
<td>Book titles - print</td>
<td>55,814</td>
<td>55,214</td>
<td></td>
</tr>
<tr>
<td>* some titles are held in both print and electronic format</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours of opening per week</td>
<td>98</td>
<td>97</td>
<td>97</td>
</tr>
<tr>
<td>Seating for public use</td>
<td>**</td>
<td>725</td>
<td>725</td>
</tr>
<tr>
<td>Number of computer workstations for public use</td>
<td>**</td>
<td>82</td>
<td>84</td>
</tr>
<tr>
<td>Number of laptops for public use</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Group study rooms</td>
<td>**</td>
<td>15</td>
<td>15</td>
</tr>
</tbody>
</table>

** the upper level of the library was closed for renovations, resulting in very limited seating and computer workstations and no group study rooms

<table>
<thead>
<tr>
<th>Use and Services</th>
<th>2006-2007</th>
<th>2010-2011</th>
<th>2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance count</td>
<td>285,314**</td>
<td>672,375</td>
<td>580,639†</td>
</tr>
<tr>
<td>Lending</td>
<td>34,646**</td>
<td>45,700</td>
<td></td>
</tr>
<tr>
<td>Inter-library lending</td>
<td>7,145</td>
<td>5,526</td>
<td>3,218</td>
</tr>
<tr>
<td>Inter-library borrowing</td>
<td>5,573</td>
<td>3,767</td>
<td>4,089</td>
</tr>
<tr>
<td>Reference questions answered‡</td>
<td>13,285</td>
<td>11,139</td>
<td>8,698</td>
</tr>
<tr>
<td>Library Instruction‡:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>number of orientation sessions</td>
<td>5**</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>number of education sessions</td>
<td>149</td>
<td>189</td>
<td>181</td>
</tr>
<tr>
<td>number of participants</td>
<td>2,652</td>
<td>3,596</td>
<td>2,761</td>
</tr>
<tr>
<td>Consultations</td>
<td>n/a</td>
<td>409</td>
<td>460</td>
</tr>
</tbody>
</table>

** the upper floor of the library was closed for renovations, resulting in very restricted services and access to the physical collections

† the study space on the upper floor of the science and engineering library was completed; a large number of students using the Health Sciences Library come from those Faculties

‡ Much of the support previously offered at the Information Desk and during instruction sessions is now provided through specialized consultations with liaison librarians
Appendix D: Organization Charts

Health Sciences Library Services Teams

Service Points:

**Reference Team**

*Coordinator:* Jo-Anne Petropoulos

*Members:* Laura Banfield, Liz Bayley, Neera Bhatnagar, Ruth Elliott, Toni Finelli, Susanna Galbraith, Jennifer McKinnell, Andrea McLellan, Jo-Anne Petropoulos, Jane Syrotuik

**Circulation Team**

*Coordinator:* Lynn Schneider

*Members:* Louise Caravaggio, Chris Erskine, Eleanor Komadowski, Fred Long, Sara Matthews, Grazyna Pietruszczak, Maria Van Hoecke, Student Assistants

**Education and Research Support:**

**Education Liaison Team**

*Coordinator:* TBD

*Members:* Laura Banfield, Liz Bayley, Neera Bhatnagar, Susanna Galbraith, Jennifer McKinnell, Andrea McLellan, Jo-Anne Petropoulos, Jane Syrotuik

**Research and Graduate Education Support Team**

*Coordinator:* Neera Bhatnagar

*Members:* Laura Banfield, Jo-Anne Petropoulos

*Draft, October 2012*
Health Sciences Library
McMaster University

* These Library Assistants work full time the busiest months of the year

L = Librarian
LA = Library Assistant

June, 2006

Health Sciences Library
McMaster University

* These Library Assistants work full time the busiest months of the year

January, 2005

20
Appendix E: Status of Response to Recommendations from Health Sciences Library External Review conducted by Michael Ridley, August 2002

√ = completed; ~ = partially completed; * = priority; ? = initiative beyond scope of HSL

<table>
<thead>
<tr>
<th>Information Resources</th>
<th>1st Tier Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1.1. Implement the Access Model with Increased IR (Information Resources) Funding</td>
<td>√</td>
</tr>
<tr>
<td>4.1.2. Interlibrary Loan and Document Delivery (ILL/DD)</td>
<td>√</td>
</tr>
<tr>
<td>4.1.4 Coordinate HSL and Thode Collections Policy</td>
<td>*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2nd Tier Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1.3. Consortial Licensing</td>
</tr>
<tr>
<td>4.1.5. Reserve Collection</td>
</tr>
<tr>
<td>4.1.6. Weed Collection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information Technology</th>
<th>1st Tier Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.2.1. McMaster University IT Vision</td>
<td>?</td>
</tr>
<tr>
<td>4.2.3. Associate Dean Information Services and Technology/Chief Information Officer</td>
<td>√</td>
</tr>
<tr>
<td>4.2.4. Access Through Library and CIS Workstations</td>
<td>√</td>
</tr>
<tr>
<td>4.2.5. Wireless Laptop Program</td>
<td>√</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2nd Tier Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.2.2. McMaster University Portal</td>
</tr>
<tr>
<td>4.2.5. Proxy Servers and Authentication/Authorization</td>
</tr>
</tbody>
</table>
### Space and Infrastructure

<table>
<thead>
<tr>
<th>1st Tier Priorities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.3.1. Learning Commons</td>
<td>✓</td>
</tr>
<tr>
<td>Focus of renovations; service points integrated; learning support services not added</td>
<td></td>
</tr>
<tr>
<td>4.3.2. Re-Allocation of Library Space</td>
<td>✓</td>
</tr>
<tr>
<td>Done as part of the renovations.</td>
<td></td>
</tr>
<tr>
<td>4.3.6. Food and Drink</td>
<td>✓</td>
</tr>
<tr>
<td>Policy to allow food and drink implemented</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2nd Tier Priorities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.3.3. Stairwell</td>
<td>~</td>
</tr>
<tr>
<td>Partially closed in; noise is still an issue</td>
<td></td>
</tr>
<tr>
<td>4.3.4. New Library Entrance</td>
<td>✓</td>
</tr>
<tr>
<td>Done as part of the renovations.</td>
<td></td>
</tr>
<tr>
<td>4.3.5. Redecorate the Library</td>
<td>✓</td>
</tr>
<tr>
<td>Done as part of the renovations; carpet being replaces summer/fall 2012</td>
<td></td>
</tr>
</tbody>
</table>

### Staff and Staff Development

<table>
<thead>
<tr>
<th>1st Tier Priorities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.4.2. Systems Analyst</td>
<td>✓</td>
</tr>
<tr>
<td>Virtual Services Librarian and Microcomputer Technician hired.</td>
<td></td>
</tr>
<tr>
<td>4.4.3 Librarians</td>
<td>✓</td>
</tr>
<tr>
<td>Information Resources Library hired, but converted to Virtual Services Librarian when position became vacant Education Liaison Librarian hired, with a focus on Nursing.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2nd Tier Priorities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.4.1. Staff Development Program</td>
<td>~</td>
</tr>
<tr>
<td>Ongoing but still informal</td>
<td></td>
</tr>
<tr>
<td>4.7.1. Culture of Assessment Workshop</td>
<td>~</td>
</tr>
<tr>
<td>Operational Review carried out in 2008-2009</td>
<td></td>
</tr>
</tbody>
</table>

### Leadership and Management

<table>
<thead>
<tr>
<th>1st Tier Priorities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.5.1. Hamilton and District Health Library Network Summit</td>
<td>✓</td>
</tr>
<tr>
<td>Strategic planning meetings starting in 2010 to vision an Academic Health Sciences Library Network; starting to consult with stakeholders and to implement some of the recommendations</td>
<td></td>
</tr>
<tr>
<td>4.6.1. Development Strategy</td>
<td>~</td>
</tr>
<tr>
<td>Working with FHS Administration and Advancement on this.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2nd Tier Priorities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.6.2. Fundraising Leadership</td>
<td>*</td>
</tr>
<tr>
<td>Still challenging.</td>
<td></td>
</tr>
<tr>
<td>4.7.2. Future External Reviews (every 5 years)</td>
<td>✓</td>
</tr>
<tr>
<td>Being planned for Fall 2012</td>
<td></td>
</tr>
</tbody>
</table>
Executive Summary (November 2009)

When a new Library Director assumed the role in April 2008, she was given the mandate to undertake a major operational review. The scope of the review was to identify the services, staffing and resources required to support the educational and research activities of the Faculty of Health Sciences as well as the funding required to support any recommendations, especially in the context of ongoing budgetary challenges.

More specifically, the purpose of the operational review was to:

- refocus library services to meet the goals of the Faculty of Health Sciences and the changing needs of its users;
- reorganize and streamline staffing to ensure that these goals and needs are being met, particularly with the challenges of increasingly larger and more diffuse user groups;
- make the most efficient use of staff and funding; and
- recommend a budget model to address the projected funding shortfall.

The operational review was conducted over an eight month period which commenced in the fall of 2008. The library’s collection and services, as well as the physical, human and financial resources of the Health Sciences Library were thoroughly examined. Data was collected and comprehensively reviewed. As a result, a number of cost saving strategies have been immediately implemented by the Director and a new organizational structure has been put in place.

During the course of the review it became evident that increased financial accountability was paramount. A budget model needed to be developed to address an ongoing structural deficit. Staffing and information resources costs were examined in great detail, to maximize the use of restricted funding. However, the reality is that if the situation were not addressed it would result in the degradation of the collection and services offered by the Library. A cost sharing model was proposed and accepted for the 2008/09 budget year.

It was also important that the Operational Review be an inclusive process, so that all librarians and staff would have a shared understanding, vision and pride in the role of the Health Sciences Library in support of its users. The library staff played an essential and enthusiastic role in the Review, and as a result has embraced the changes.

A number of key findings and recommendations have been highlighted in the next section of this report.

It is important to note that this type of review is not an end in itself. There are certainly more questions to be answered, and a need to constantly reassess how the Health Sciences Library is being used and what we are doing to support our users. I am pleased to report that as recommended in the External Review carried out by Michael Ridley in 2002, the Library has now built a culture of assessment and accountability.
Key findings and recommendations:

1. The Library is used whenever it is open, and changing hours of opening would adversely affect users, particularly students. **Recommendation:** maintain the current hours of operation [exception, Saturday closing was changed from 7:00 p.m. to 6:00 p.m. to allow for a single staffing shift]

2. The physical library is used primarily by students, not only from the Faculty of Health Sciences but from all McMaster Faculties. **Recommendation:** The Health Sciences Library should be considered as a university-wide space, and funding should be allocated accordingly.

3. The Health Sciences Library has a strong collection which meets the needs of its users. While the focus is on electronic resources, the physical collection is still heavily used. **Recommendation:** priority should be given to maintaining the Information Resources budget.

4. The use of the service points has changed, with fewer high level interactions with staff. **Recommendation:** reduce the number and level of staffing, using students to cover the later hours of opening. [http://hsl.mcmaster.ca/about/support/howto.html](http://hsl.mcmaster.ca/about/support/howto.html)

5. Pressures from price increases due to inflation, the value of the Canadian dollar, the high usage of electronic resources, and higher license fees due to the increasing size of the student body and research funding intensity have resulted in a major funding gap between the budget allocated to the Health Sciences Library Information Resources and the dollars required to maintain the collection needed to support the education and research activities of the Faculty of Health Sciences. All attempts have been made to limit the staffing and operating budgets, by seeking out recoveries, fundraising, cutting the staff complement by not replacing vacancies due to retirements. **Recommendation:** implement the Cost Centre Budget Model to cover shortfalls in the information resources budget in order to maintain the present collection.

6. Other areas of the collection and services still need to be evaluated, and the use of the physical space needs to be monitored regularly. **Recommendation:** Continue to apply the tools developed for the Operational Review, and continue to assess all areas of the Health Sciences Library.
Appendix G: Building an Academic Health Sciences Library Network

Building an Academic Health Sciences Library Network:
ReVisioning the Hamilton and District Health Library Network

Step 1: Setting the Stage: Strategic Planning Retreat, June 2, 2010

ATTENDEES:
Hamilton Health Sciences (2 participants)
Juravinski Cancer Centre (2 participants)
St. Joseph’s Healthcare (1 participant)
Joseph Brant Hospital (1 participant)
Niagara Health System (1 participant)
Hamilton Public Health Services (1 participant)
Mohawk College Institute for Applied Health Sciences (1 participant)
McMaster University Health Sciences Library (2 participants)

FACILITATOR: Faculty member from the School of Rehabilitation Science with extensive experience in facilitating group discussions

A survey was sent out to all participants in advance to get an overview of current services, key user groups and current use of the Network services. Results were summarized at the Retreat.

Participants agreed to engage in a process that would allow them to build a vibrant and revitalized library service for an Academic Health Sciences Network. More specifically, the group was in agreement that the process had to result in value added library services resulting from their collaboration.

Step 2: Examining the Services and the Options

It became clear that the process would need to be broken down to focus on the different services required to meet the diverse needs of our clients. Therefore, starting in September 2010 meetings were held to address the following topics:

1. Support for clinical care: September 23, 2010
2. Support for education: October 14, 2010
3. Support for research: November 11, 2010
4. Support for patients and consumer health: January 14, 2011
5. Support for continuing education and competency maintenance: January 14, 2011
6. Overview meeting to make plans for the future: December 14, 2011

Each session was led by at least two of the network members. The method adopted was advanced preparation and distribution of topic overviews and readings, guided discussion with invited speakers, and follow-up summaries and recommendations. At each meeting, we looked for best practice. We looked at both current services at member institutions and but also at what might be possible.

Step 3: Looking to the Future: Summarizing the results and making recommendations

Due to the retirement of the Chair of the Hamilton and District Health Library Network in December 2010, the project was delayed. Another member has now agreed to take over as the Chair and a meeting to review the results of the discussion of the five components, to summarize and synthesize those results and to prepare a recommendation document is scheduled for December 14, 2011.
Building an Academic Health Sciences Library Network
Liz Bayley and Jennifer McKinnell, February 13, 2012

Vision
To leverage the strengths and expertise of McMaster’s Health Sciences Library to support health sciences education, to inform clinical care and to build research capacity across the LHIN by providing enhanced access to timely best evidence and information resources and to ensure training and support in use of those resources.

Goals:
- To ensure a rich evidence-based environment for students and faculty
- To foster collaboration between institutions
- To provide seamless access to resources and services, with a “just in time” rather than a “just in case” approach
- To build efficiencies by streamlining processes, reducing duplication of resources and licensing jointly
- To work within the legal framework governing the use of licensed resources

Issues:
McMaster University has a broad collection of high quality resources to meet the educational and research needs of its faculty, staff and students. In addition, the Health Sciences Library participates in or directly licenses resources which support clinical education and health sciences research. A McMaster faculty appointment allows access to all of these resources under the terms of the licenses.

Hospitals and other healthcare institutions have purchased or licensed resources to meet the needs of their staff, particularly their clinical staff. These collections vary widely in terms of size, scope and quality, with funding being the main challenge. As research moves to clinical settings, the collections are inadequate to meet the needs of the researchers.

Therefore, there is an enormous disparity between healthcare professionals with McMaster faculty appointments, who have immediate desktop access to all McMaster licensed resources and hospital staff who have limited access to a select collection of resources.

Proposed Solutions

**Collaborative approach to licensing key clinical resources:** The hospitals would be responsible for funding, authenticating users and providing point-of-care access for the clinical care resources; McMaster Health Sciences Library would facilitate selecting, evaluating and negotiating consortial licenses to get optimal costing and to provide academic access to the resources for Faculty of Health Sciences.

**McMaster appointments for healthcare professionals engaged in educational roles:** McMaster Health Sciences Library would be responsible for funding the resources needed for McMaster teaching and learning, facilitating access to those resources from off-campus and coordinating training and support in their use.

**The Health Sciences Library as the resource library:** McMaster Health Sciences Library would be the resource library and facilitate timely delivery of material from its collection through processes covered by the license agreements.
March 5, 2010: Hamilton Health Sciences/McMaster University Joint Library Strategy Session: the consensus from the strategy session supported a consortial network to provide library support for healthcare institutions and practitioners in the area.

June 2, 2010: Hamilton and District Health Library Network Strategic Planning Retreat: participants agreed to engage in a process that would allow them to build a vibrant and revitalized library service for an Academic Health Sciences Network. More specifically, the group was in agreement that the process had to result in value added library services resulting from their collaboration.

September 2010-January 2011: A series of meetings focusing on the different services required to meet the diverse needs of our clients. At each meeting, we looked for best practice. We looked at both current services at member institutions and but also at what might be possible.

December 14, 2011: Meeting to review the results of the discussion of the five components, to summarize and synthesize those results and to prepare a recommendation document.