MBLWHOI LIBRARY
Recommendation for Webinar Series

Partner Librarians: Lisa Raymond & Jennifer Walton, Co-Directors
Project completed as a requirement of IST 613 Library Planning, Marketing, and Assessment

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**Executive Summary**

This report was completed for a graduate level class at Syracuse University entitled IST 613 *Library Planning, Marketing, and Assessment*. This report was completed in partnership with Lisa Raymond and Jennifer Walton, Co-Directors of the MBLWHOI Library in Woods Hole, Massachusetts. The following report delivers information on the existing value and impact areas of the library including an analysis of the existing stakeholders, services, and resources.

The MBLWHOI Library is a vital resource to the five science institutions located in Woods Hole, Massachusetts, as it provides both strong core and specialized services to assist patrons in furthering their endeavors in discovery, education, and research; however, communicating the value and impact of the library and its specialized services to its busy user community can be challenging. Bridging this gap is how the recommendation of the monthly lunch and learn webinar series was developed.

The lunch and learn webinar series will not only help the library to share its specialized services and resources with its community, but it will also allow the library to meet and expand a good number of the goals listed within its Strategic Plan for 2018. A focus on identifying user needs via assessment will be key to creating a webinar series that is both relevant and inviting to the library’s community. By using webinar services that are provided at no cost by the institutions, the library can reinforce communication with its users, while also ensuring that the library budget remains primarily focused on resources, such as journal articles, that are of great importance to library patrons. Strengths for the recommendation stem from dedicated library staff, evidence of user needs for instruction on specialized services, as well as the library’s strong core values of furthering the education and research projects within the Woods Hole community.

Marketing of the webinar series via flyers, social media, and email newsletters will refresh the library’s presence on campus, thus helping it to meet its goal of being viewed by the community as the primary knowledge resource on campus. The increased communication efforts will be tailored to various audience types by using key messages for each user group, as well as ensuring that the communication initiated by the library is brief, informative, and timely.

Assessing the webinar series will be essential, and the continued success of the program will rest on the library’s ability to identify strengths and weaknesses in the series, as well as user need areas. User surveys, focus groups, informal conversations, and library statistics will all be collected and used as assessment tools. Assessment of the webinar series will help the library to ensure that the series’ outcomes and strategic plan goals are being met.

Available library staff time and library budget will determine the ability of the library to implement the webinar series; however, the benefits of implementing the webinar series will not only create a platform for the increased exchange of knowledge between the library and its users, but it will also bring renewed focus to the library that will allow for the library to maximize the value and impact they are able to bestow on their user community.
Course Information

IST 613- Library Planning, Marketing, and Assessment
School of Information Studies, Syracuse University

Course Description

This course focuses on ways in which libraries create and deliver value to their users and stakeholders, as well as the institutions, organizations, or communities of which they are a part. In order to make an impact and provide a return on the investment made in libraries, librarians must determine the degree to which their services, expertise, and resources contribute to the ability of their institutions, organizations, or communities to meet their missions and fulfill their purposes. Once determined, the value and impact of libraries must be developed and shared.

Three main skill sets for increasing and communicating the value and impact of libraries include assessment, project management, and communication/marketing. To develop these skills, this course embeds students within the context of an individual library where they: 1) determine the purposes/missions of the overarching institution/organization/community of which the library is a part, 2) assess the degree to which existing library services, expertise, and resources contribute to those purposes/missions, 3) develop a report of the current value and impact status of the library, 4) make recommendations to develop and communicate the value and impact of the library through the expansion or creation of library services, expertise, or resources, and 5) create a literature review and project management, communication/marketing, and assessment plans to support those recommendations.

Course Learning Outcomes

As a result of this course, you will be able to:

A. communicate and collaborate with a partner library and librarian,
B. determine the purposes/missions of the overarching institutions/organizations/communities (OIOCs) of which the library is a part,
C. identify areas of focus, interest, or need of importance to library OIOCs and stakeholders,
D. assess the degree to which existing library services, expertise, and resources contribute to those areas of focus, interest, or needs,
E. summarize the current value and impact of the library and its ability to communicate that value and impact,
F. rethink, refine, or redefine ways in which the library can deliver value and impact,
G. develop recommendation(s) to help the library create and communicate increased value and impact,
H. create a literature review to support suggested recommendation(s),
I. utilize basic project management processes, tools, and strategies to plan the development and roll out of suggested recommendations,
J. devise communication/marketing messages and media to ensure the success of suggested recommendations,
K. craft assessment questions, methods, and analysis strategies to determine the degree to which suggested recommendations augment the library’s value to and impact on OIOCs and stakeholders,
L. create a final report and presentation of professional quality for the partner library and librarian, and
M. engage rigorously as a class member, teammate, and leader.

For questions about course content, please contact Dr. Megan Oakleaf at moakleaf@syr.edu
Analysis of the Library’s Current Value & Impact Status

Current Overarching Institution, Organization, or Community (OIOC)

The Marine Biological Laboratory and Woods Hole Oceanographic Institution Library’s (MBLWHOI) central focus is to provide the members of the scientific community of Woods Hole, Massachusetts with the high-quality information and resources required to practice and create outstanding research within their institutions, as well as within the global community. There are numerous OIOCs that the MBLWHOI Library shares resources with; however, there are five institutions within the Woods Hole Community that are primarily served by the library and will be the focus of this report. The five institutions that create the primary OIOC group are:

- The Woods Hole Oceanographic Institution
- The Marine Biological Laboratory
- The Woods Hole Research Center
- The Sea Education Association
- The USGS Woods Hole Science Center

Between the five institutions, the library serves approximately 3,000 practicing scientists and students. Each institution served by the MBLWHOI Library strives for excellence in their scientific research, education, and application of learned knowledge to real world situations that are currently being encountered within our society.

Outside of the core OIOC group, MBLWHOI Library is affiliated with multiple organizations that focus on resource sharing, collaboration, education, and preservation.

- Massachusetts Library System
- Boston Library Consortium
- Easter Academic Scholar’s Trust (EAST)
- Biodiversity Heritage Library (BHL)
- International Association of Aquatic Marine Science Libraries and Information Centers (IAMSLIC)
- NOAA Northeast Fisheries Science Center
- The University of Chicago
- Massachusetts Institute of Technology
- MIT/WHOI Joint Program

The MBLWHOI Library building on The Marine Biological Laboratory’s campus that houses the physical print collection and the rare books archive is open to the public during regular library hours; however, the relationship with the public is to educate the public on the research and educational efforts of the library rather than to provide access to their resources to the public.
Key Stakeholder Groups for the MBLWHOI Library

The main focus of the MBLWHOI Library, as stated previously, is to provide the Woods Hole scientific community with the resources and information they need to strive and success in their educational and research efforts. With the top five OIOCs for the library being the local scientific institutions, the main stake holder group for the MBLWHOI Library is comprised of the individuals who work and study within these institutions. The consortia partnerships the library has through various organizations make up the second group of key stakeholders for the library, as their relationship with these organizations and their members help to further the scientific research and education efforts on the east coast and around the world.

Primary Stakeholders for the MBLWHOI Library

- The Woods Hole Oceanographic Institute (WHOI)
- The Marine Biological Laboratory (MBL)
- The Woods Hole Research Center (WHRC)
- The Sea Education Association (SEA)
- The USGS Woods Hole Science Center (USGS)

Key Stakeholders within the 5 OIOCs (MBL, WHOI, WHRC, SEA, USGS)

- Practicing Scientists
- Graduate & Post-Doc Students
- Research Faculty
- Guest Students
- Instructors/Lecturers
- Remote Scientists & Students
- Department Administrative Assistants
- Administrative Professionals
- Department Heads
- Deans
- Institution Presidents
- Visiting Scholars
- Prospective Students
- Prospective Faculty & Scientists
- Undergraduate Summer Visitors
- Members of the Library’s Join User Committee
- Library Volunteers
- Alumni
- Donors
- Retired Scientists
Key Stakeholder Groups within Consortia & Partnerships

◊ Librarians
◊ Paraprofessionals
◊ Administrators
◊ Faculty, Staff, Students of Consortia Institutions

Purposes and Missions of the OIOC

The MBLWHOI Library, “is dedicated to advancing scholarship and education in the Woods Hole Scientific Community through Library services, innovative research, collaborations and informatics tools,” (Raymond & Walton, 2018). Providing the best possible service to all users of the library is a top priority for the library staff and is included in every annual strategic plan. Collaboration with global partners is key to providing the best resources and services to the library’s users. The MBLWHOI Library strives to “provide access to scientific information for the creation of new knowledge through collections, resource sharing, preservation, and the development and implementation of new technologies,” (Raymond & Walton, 2018). The mission of the MBLWHOI Library is to provide services and resources to advance educational and research endeavors, which aligns with the mission statements of the institutions it serves, as exemplified by the statements listed below.

The Woods Hole Oceanographic Institution:

“The Woods Hole Oceanographic Institution is dedicated to advancing knowledge of the ocean and its connection with the Earth system through a sustained commitment to excellence in science, engineering, and education, and to the application of this knowledge to problems facing society,” (Woods Hole Oceanographic Institution).

The Marine Biological Laboratory:

“MBL is dedicated to scientific discovery- exploring fundamental biology, understanding biodiversity and the environment, and informing the human condition through research and education,” (Marine Biological Laboratory).

The Woods Hole Research Center:

It is the mission of the Woods Hole Research Center “to advance scientific discovery and seek science-based solutions for the world’s environmental and economic challenges through research and education,” (Woods Hole Research Center).

The Sea Education Association:

“SEA is a global teaching, learning and research community dedicated to the exploration, understanding and stewardship of marine and maritime environments. SEA empowers students with life-changing sea voyages of scientific and cultural discovery, academic rigor and personal growth. Our SEA Semester program features an
interdisciplinary curriculum and dynamic leadership-development experience- at sea about tall ships and on shore,” (SEA Semester).

The USGS Woods Hole Science Center:

“The USGS serves the Nation by providing reliable scientific information to describe and understand the Earth; minimize loss of life and property from natural disasters; manage water, biological, energy, and mineral resources; and enhance and protect or quality of life,” (U.S. Geological Survey).

The focus areas described in the library’s strategic plan for 2018 also align with the educational and research needs that are described within not only the MBLWHOI Library mission statement, but also within the mission statements of the top institutions it serves. By focusing on the services listed below, the library is able to not only share resources that meet the research needs of Woods Hole’s prestigious scientific community, but they are also able to help their users to collaborate, engage with, and share resources with scientists all over the world.

Library Focus Areas (As described in the 2018 MBLWHOI Library Strategic Plan)

◊ Institution Prestige
◊ Research Productivity
◊ Innovation and Entrepreneurship
◊ Student Experience and Engagement
◊ Grant-Seeking
◊ Inclusion
◊ Endowments
◊ Global Engagement (Data Repository & Vivo)

Existing Impactful Services, Expertise Areas & Resources (SERs)

The library provides services that users typically think of when they think about an academic library. They curate a collection of both print and digital materials that meet the needs of their prestigious scientific community. Serials are a large part of the library’s budget each year for new resources. The library also provides reference services to users, remote access to the library’s digital materials, and interlibrary loan with its consortium partnerships for materials that users need but are not physically held by the MBLWHOI Library. Data is also at the core of services provided by the MBLWHOI Library. Within the Woods Hole Oceanographic Institution’s library space, the MBLWHOI Library offers a Data Library that helps to preserve and share the data collected by the institutions’ scientists. They also offer a repository, Woods Hole Open Access Server (WHOAS), that aims to “capture, store, preserve, and redistribute the intellectual output of the Woods Hole scientific community in digital form,” (MBLWHOI Library, 2018b). This repository allows for easy sharing of data between scientists, but also helps to connect research happening within the Woods Hole Community with colleagues around the world.
In 2017, a new outreach service called VIVO was adopted by the MBLWHOI Library that joins academic communities around the world via a social media-like space where scientific scholars can easily collaborate and share their research. The library’s webpage for VIVO describes the service as a “research-focused discovery tool that enables collaboration among scientists across all disciplines,” (MBLWHOI Library, 2018a). VIVO currently hosts 53,000 people from 516 organizations and represents about 45,000 various research efforts (MBLWHOI Library, 2018a). This is the newest service to be implemented by the MBLWHOI Library that paves the way for their scientists and students to connect with colleagues from around the world to share knowledge and to create partnerships that have the capability of creating significant impact within both the scientific and global community.

Core Services of the MBLWHOI Library
(The Core Services identified in the 2017 MBLWHOI Report are listed with a *)

◊ Acquisitions & Management of Collections*
◊ Citation Management & Copyright Education/Information*
◊ Course Reserves*
◊ Institutional Archives*
◊ Instructional Programming*
   ○ Lectures, Tours & Orientations given on request
◊ Public Outreach*
   ○ Main Goal: to tell the story of the library
◊ Interlibrary Loan*
◊ Reference Services*
◊ Records Management*
◊ Remote Access to Electronic Resources*
◊ Working Space*
   ○ Rentable office space is provided during the summer months at the library location at MBL.
   ○ Workspace is also provided in the reading rooms and upon request in the archives.
◊ Data Library, Services & Open Data Efforts
◊ Implementation of Elements Software and VIVO
   ○ VIVO is a social media-like tool that scientists can use to collaborate with other scholars around the world.
◊ Institutional Research Services
◊ WHOAS: Woods Hole Open Access Server (Repository)
   ○ Easy to share data among scientists

Existing Value, Impact Data and Evidence

Evidence showing the library’s value and impact come primarily from the circulation and journal usage statistics. Within 2017, the library circulated 719 items from their collection, lent a total of 3,352 articles and books, borrowed a total of 1,593 books and articles from other institutions, and used 98,000 journal articles from various publishers (Raymond & Walton, 2018a). The institutional repository, the Woods Hole Open Access Server (WHOAS), added 728 new
metadata records, which brought the total at the end of 2017 to 8,992 metadata records (Raymond & Walton, 2018a).

Evidence in the form of user success stories are of high priority as they show the value and impact that the MBLWHOI Library brings to its user community. Many of the recent user success stories stem from the work the library is doing to preserve and share data through the repository and through the VIVO service. Scientists are now creating partnerships with colleagues in other parts of the world, thus allowing scientific endeavors to grow and become more impactful to communities around the globe.

Circulation statistics are destroyed in order to keep the information private. There are currently no statistics from user needs surveys, as the library has not completed a user survey in some time. The library does receive some user feedback throughout the year, which helps to pinpoint areas of success as well as areas that could be improved.

**Existing Value and Impact Communication Strategies**

The MBLWHOI Library currently employs numerous procedures for communicating the library’s efforts with its user community.

- **The library website** is a main resource for sharing what the library has, what the library can do for its users, and where the library is headed.
- Social media outlets such as **Facebook and Twitter** are used by the library to share events, services, and other important news with the user community.
- The library also sponsors a **Joint User Committee** that meets several times a year and incorporates representatives from each of the five main institutions served by the library. This committee is in place to ensure that all library services and resources are shared among the institutions and so there is a platform that allows for collaboration between the institutions.
- The MBLWHOI Library also utilizes their respective **communication departments** (MBL & WHOI) for making announcements on behalf of the library. This communication is saved for big library events and breaking news.
- **Posters and signs** are posted on bulletin boards around the institutions served, and within the library, that creatively share library impacts and programs. These posters were implemented to attract the attention of the busy scientists and students that work and study within the institutions and to share with them the big possibilities that can be found at the MBLWHOI Library.
- Library impact and value are also shared within the **year’s end reports** and includes the library’s usage and circulation statistics, the programs and services conducted, new projects, and updates on existing partnerships and endeavors. This year-end report is posted within the institutional repository and is distributed to the Joint User Committee and institution administration.
Library Goals (As listed in the 2018 Strategic Plan)

◊ Gain more users
◊ Have better informed users (educating users of tools through senior staff, meetings, and admin professional meetings)
◊ Name recognition
◊ Showing value for money
◊ More marketing (library brochure to new students/employees, flyers for bulletin boards, interest groups on Open Access trial, and user stories
◊ Think outside of typical library services for potential new projects that meet user needs
◊ Library to be knowledge center on campus
◊ ILL still vitally important to help users get resources that are only available in print
◊ Library space to be flexible and collaborative
◊ Collaborations (Both new and existing)
◊ Continue to tell the story of the institutions
◊ Library as primary tool for research and data questions

Recommendation for Future Developments: Webinar Series

The MBLWHOI Library offers numerous services that enable practicing scholars within the Woods Hole community to excel in their research and education. As with any academic library, a core set of services are provided including collection management, course reserves, interlibrary loan, remote access to electronic resources, and physical library space for the working scholar. In addition to the basic core list of services and resources, the MBLWHOI Library has worked hard to offer services that meet the professional needs of their elite scientific community, which includes providing a data library, an open access server/repository, and a social-media like service called VIVO. All of these specialized services work toward preserving all scientific output across the five institutions within the Woods Hole community.

Along with providing these specialized services, there is a need for the library to share the potential positive impact that could be made on the lives of the patrons by using the specialized services and programs. With a prestigious community of mostly practicing scholars, a small group of graduate students, and few undergraduate students, it can be challenging to reach out to the community in a way that is fully embraced by the faculty and scientists. One way that the value and impact of these services can further be shared and explained to library users is through a monthly lunch and learn webinar. The webinar would allow users from the five institutions to sign in from any location in order to learn about library services that will not only meet their current needs but will also positively impact their current research and future endeavors.

The lunch and learn webinar would be promoted and held once a month and would focus on topics that surround the specialized data services that are provided by the library, as well as any other topics that users identify as a critical need. Topics covered by the webinar would include: WHOAS: Woods Hole Open Access Server (Repository), data preservation, data management/planning, the VIVO service, citation management/copyright, grant resources, special collections, and user success stories. The webinar itself would last between 45 minutes to
an hour and would not only provide instruction but would also offer a question and answer period for the participants. The question and answer time could also be used to gather ideas for further topics that can be reviewed during the monthly webinars. As part of implementing this new service, it will be crucial to conduct a user needs assessment. Gathering data regarding user needs and perceptions of the library, as well as its services, will be vital in creating a webinar service that speaks to the most crucial needs that the scientific community has.

Both the Marine Biological Laboratory and the Woods Hole Oceanographic Institution offer webinar software that can be used for a fee. It will be most beneficial to use services already offered by the institutions, as it will help to avoid additional costs for a special library-based webinar service, as well as other accrued costs for additional software, technology equipment, and staff training. Providing the webinar with minimal costs will require using the webinar resources offered by the institutions, as well as using the strengths and expertise of the library staff. Bringing the library to the patrons in innovative ways, such as the webinar series, will be critical in allowing the patrons to see the value and the expertise that can be brought to their own personal research by the library.

Monitoring the success of the webinar program will need to be ongoing as the success of the program will depend on the number of users who sign in each month to attend the webinar, as well as how the user-identified needs are applied to the webinar schedule. Open dialogue opportunities will be crucial in not only promoting the new service, but also in obtaining user feedback.

**Literature Review**

**Portraying Library Value to Academic Community**

One of the most challenging aspects of academic librarianship can be keeping faculty and scholars informed of library programs and resources. Wilcox and Boon Chia (2013) state, “While librarians understand the relevance of the library, students and faculty may have to be persuaded that the library has the critical resources and expertise to help them attain their goals,” (p. 180). Tremblay & Wang (2008) describe the key to promoting and “building awareness” of the library resides in creating and sustaining a relationship with faculty, as they are the ones who will connect the library to other users, including both local and remote students (p. 216). Creating an open relationship with faculty can be difficult to achieve, as faculty members may not perceive librarians to be their peers due to the “clerical” work that is usually associated with the library, such as “circulation” and “inter-library loan,” (Reeves et. al., 2008, p. 61). Because of this misinterpretation of librarian qualifications and knowledge, faculty members may be “reluctant to receive instruction from the library,” (Reeves et. al., 2008, p. 61). Anthony (2010) states that “…contemporary academic librarians must reach out to faculty in order to reaffirm the importance of their services, proactively promote the use of their services, and demonstratively involve themselves in the institution’s missions of teaching and research,” (p. 85).

One way to combat this inaccurate assumption of decreased value in the library, and to increase faculty support, is to use the model Wilcox & Boon Chia (2013) borrowed from economists Davenport and Beck called “the stickiness model” (p. 176). The adoption of this model by academic libraries could be very valuable, especially when actively seeking to attract and retain
users, as it focuses on four very important factors “convenience, relevance, engagement, and community,” (Wilcox and Boon Chia, 2013, p. 176). These four factors are usually among the top priorities within an academic library’s strategic plan as they strive to provide meaningful services and programs to their community. Evaluating certain stakeholder groups against the four factors of the stickiness model will allow librarians to identify the types of library services that users find most important, thus allowing the library to attract an involved and ‘sticky’ user base. By adopting and enacting this “stickiness model,” Wilcox and Boon Chia (2013) believe the library will be able to better assess its “strengths and weaknesses” in order to ensure that there is “continued importance in the library within the university learning community,” (p. 177).

**Portraying Library Value to Faculty Via Workshops and Technology**

When surveying faculty using the “stickiness model,” Wilcox and Boon Chia (2013) found that faculty and researchers find the “relevance” of services within the library to be more valuable when compared to “convenience” “engagement” and “community” (p. 183). One way that relevancy could be demonstrated to the researcher and faculty community is to provide workshops that “…help to demonstrate the library’s expertise,” which can “provide[s] a greater scope for collaboration with faculty in teaching and research projects,” (Wilcox & Boon Chia, 2013, 180). Reeves et al. (2008) also touched on this idea of workshops as they explored “lunchtime library workshops,” which focused on relevant topics that met faculty needs (p.65). After the implementation of these workshops, Reeves et al. (2008) found that the number of faculty requests for librarian classroom instruction and resources increased. Because the librarians participated in “professional engagement” with the faculty and researchers, there was more respect for the library and the librarians across campus (Reeves et al., 2008, p. 66).

Docherty & Herold Faiks (2008) find that the combination of “outreach and teaching” along with the “increase[ed] demands to bring services to users at the point of need,” create an environment that makes the use of interactive web-based tools within academic library programming essential (p.213). Dewan & Steeleworthy (2013) describe “electronic offerings” such as online tutorials, mobile-friendly websites, and interactive webinars as ways for the academic library to increase their “instructional reach” to all of their stakeholders (p. 282). By examining the resulting factors of increased technology use in an academic library, Montgomery (2010) found that providing the latest technology can be one of the best ways for “…academic librarians [to] virtually integrate themselves in the academic life of [their] users,” (p. 306). Montgomery (2010) found that webinars are one such technology that can bring an “active learning experience” to library users wherever they are (p. 310). With “relatively low costs” and the added benefit of the removal of “professional development barriers,” webinars can build a community where everyone is working together toward a common goal (Zoumenou et. al., 2015, p. 63).

**Implementation of Monthly Webinar**

Peuler & McCallister (2018) described what they learned from implementing a monthly webinar series for The North Carolina Library Association (NCLA), which included being aware of all webinar software options (including options provided by the institution), keeping the webinar to an hour or less, and offering the webinar on the same day of the week each month. The creation of a logo for the webinar series was also seen as a positive addition to the marketing efforts for the series (Peuler & McCallister, 2018). Assessment was another vital aspect of the webinar program that Peuler & McCallister (2018) described, as assessments during and after the webinar
helped to identify user comments on ease of webinar software use, as well as future topics to address (p.7). Zoumenou et. al. (2015) describe similar areas of focus for interactive webinar implementation, of which top priority was given to ensuring that the webinar reflected “compelling topics” and “engaging presentations,” (p. 66). Providing an “asynchronous portion” to users outside of the webinar was also identified as key to reaching those who were not able to make it to the live event, as well as providing ample time for a question and answer period that allows the users to clarify topics discussed, but to also enable the webinar administrator to “collect feedback,” (Zoumenou et. al, 2015).

**Marketing and Assessment**

When evaluating library programs both before and after implementation, the main goal is to “…assess the extent to which the library is meeting the needs of its customers; to assess the extent of which library customers are satisfied with library services; [and] to recommend the implementation of changes in the library based on the surveys that are conducted,” (Porat, 2013, p.62). As German & LeMire (2017) discuss, “identifying specific and measurable outreach outcomes is ideal, but fully assessing those outcomes is not always feasible depending on the structure and scale of the outreach event,” (p. 68). Assessing these outcomes helps the library to not only identify areas that could improve current library services, but also how the specific program being assessed can be made better in order to meet library user needs (German & LeMire, 2017). The identification of user needs is one of the primary benefits of assessment and outreach that Meyers-Martin & Lampert (2013) described within their article on Oviatt Library at California State University. Meyers-Martin & Lampert (2013) describe that “identifying the needs of its wide range of users (students, faculty, staff and community), [allows] the Oviatt Library [to] continuously develop outreach programming that utilizes a variety of venues and formats,” p. 220

When conducting a library assessment, it is important to provide incentives to users who participate. Porat (2013) describes an assessment initiative conducted at the University of Haifa in Israel where no incentives were offered during the library’s assessment period, which negatively impacted the number of responses received. Holtze (2002) states that “provid[ing] a benefit, like free coffee…” can be a beneficial way to reach library users, especially members of the faculty. Informing users, especially faculty members, of the library’s relevant and new resources, posting important information on bulletin boards, and sharing the library’s value as a resource center on campus are all crucial to not only attracting users, but also providing evidence for reasons why the library needs to continually assess how they are meeting user needs (Holtze, 2002). Buy-in is another aspect to library assessment that Owens & Bishop (2018) label with high importance, as a library with “…a culture of yes understands that outreach creates positive associations with the library and encourages students to see the library as a partner in their success,” (p. 81)

When assessing the library, German & LeMire (2017) label data collection as an important step within the assessment process as it helps librarians to “demonstrate the value of their outreach efforts to stakeholders both inside and outside the library as well as make iterative design improvements to their outreach activities to position themselves to make further impact at future events,” (p. 73). Tying the data collected from the library’s assessment back to the strategic plan
for the library and the university at large is crucial to ensuring that the information collected will have the most impact for the library’s user community (Strategic Marketing, 2003, p.9). The American Library Association’s guide to strategic marketing states “a strategic plan builds on market and customer research and identifies the actions an organization must take to further meet its customers’ needs and the goals of the organization,” (Strategic Marketing, 2003, p. 26).

Having a customer-oriented focus, as described within the Strategic Marketing Manual (2003) is a “fundamental idea of marketing,” (p.11). Viewing the library’s marketing responsibilities through the “customer’s point of view,” is the best way to ensure successful communication between the library and its users. Library “marketing requires that you find ways to not only fulfill your customers’ current expectations about your library’s services, but also to prepare to offer products and services for future needs for which customers, themselves, may only be vaguely aware!” (Strategic Marketing, 2003, p. 11). Owens & Bishop (2018) describe this customer-oriented focus within the library as “a culture of yes” by stating that “a library that has a culture of yes understands that outreach creates positive associations with the library and encourages students to see the library as a partner in their success,” (p. 81).
Project Plan

Introduction

The proposed recommendation for the MBLWHOI Library is a monthly lunch and learn webinar hosted by the MBLWHOI Library that would work to not only instruct users on how to use the various services provided by the library, but to also connect the library to all users across the five institutions. The topics covered will be those that are most valuable and relevant to library users, such as data management and the Open Access Server (WHOAS). The MBLWHOI library strives to offer services that meet the needs of the science community; however, it can be challenging to sustain a strong relationship with users that are spread out across multiple institutions. Users have expressed that they would like to have more opportunities to learn about the data services and practices that the library provides; however, they may not always be able to physically visit the library.

The goal of this webinar series is to provide instruction and information to the users on topics that they have labelled as relevant to their own research and work, and to do so in a way that allows the maximum number of users to participate by eliminating the need for travel. This will allow the library to reach more users, share and build upon their existing services, and create a platform for further collaboration between the library and its users.

Relationship to Library Strategic Planning

The proposed lunch and learn webinar program would meet multiple library goals that were described in the MBLWHOI Library 2018 Strategic Plan. Out of the twelve library identified goals, eight can be met by successfully implementing the webinar service.

Strategic Goals Met:

- Gain more users
- Have better informed users
- Show the value of the library - especially when based on money spent
- Thinking outside of typical library services to meet user needs
- Library as knowledge center on campus
- Collaborations (existing & new)
- Library as a primary tool for research & data questions
- More marketing efforts

This program would not only attract more users to the library, but it would work to ensure that all library users are more informed, have avenues to meet their needs, and find the library to be an important knowledge and research resource within their own studies. The library would be creating a service that is outside of the usual reference and face to face interactions, would be establishing itself as a knowledge center between all five institutions, and would be creating a service that doubles as a marketing effort to attract usership.
Missions and Values Met through Webinar

✓ “...dedicated to advancing knowledge of the ocean... through sustained commitment to excellence in science, engineering, and education...” – Woods Hole Oceanographic Institution (WHOI)

✓ “...dedicated to scientific discovery...through research and education...” – Marine Biological Laboratory (MBL)

✓ “...advance scientific discovery and seek science-based solutions...through research and education...” – The Woods Hole Research Center (WHRC)

✓ “...is a global teaching, learning and research community dedicated to exploration, understanding...empowers students with...academic rigor and personal growth...” – The Sea Education Association (SEA)

✓ “...by providing reliable scientific information to describe and understand the Earth...” – The USGS Woods Hole Science Center (USGS)

It is the mission of all of the institutions within the Woods Hole community to make a strong and long-lasting impact on this earth through discovery, education, and research. In order for the institutions to meet their collective and individual missions and visions, it is vital that they have a place where they can gather resources, manage their data, and collaborate with others. The library fills these vital needs and has become a central resource to the Woods Hole Community by working hard to provide the information and resources necessary to enable scientists to make discoveries that impact many lives around the world. Through the implementation of the webinar service, users will see the continued dedication of the library and its staff to the research being conducted, collected, and shared within the community which will renew the value of the library to its users.

User Needs Assessment

Key Internal Stakeholders impacted by recommendation

✧ Library Co-Directors
✧ Technical Services Coordinator
✧ Senior Automation Services Officer
✧ Resource Sharing Librarian
✧ Data Librarian
✧ Library Publication Services
✧ Systems Librarian
✧ Administrative Professionals

Key External Stakeholders impacted by recommendation

✧ Practicing Scientists
✧ Graduate and Post-Doc Students
How Recommendation relates to Internal Assessments

The data collected by the library focuses mostly on the circulation of resources and journal usage statistics. This data proves that the library is providing resources that meet a vital need for users, as the MBLWHOI Library Review from 2017 shows that 3,352 articles and books were lent, and 98,000 journal articles were used. Other than providing resources, the library is continuously striving to connect with users and attract them to the library. Based on a conversation with the library’s Co-Directors, there is difficulty experienced when finding ways to engage with users that is not seen as an inconvenience to their users. Because of this, it can be difficult to share all of the ways that the library can meet multiple research, data, and resource needs that users have. The proposed webinar program addresses this gap that the library is experiencing by providing a service that will meet users wherever they are located, shares information and resources that are relevant to their research, and provides a platform for increased communication and collaboration between the library and its users.

How Recommendation relates to External Assessments

The library has not conducted any formal user assessments in quite a number of years. Most user-related data is not kept by the library and is destroyed to protect user privacy. The library depends mostly on word of mouth feedback from users, as well as occasional focus groups on specific new or developing services. Without formal user assessments, it can be difficult to determine how users would like to hear about library offerings, events, and programs. It can also be difficult to identify need areas that the library can help to meet through existing and/or new services and programs. Based on information gleaned from the Joint User Committee meeting on November 7, 2018, and a small focus group of individuals from a couple of the institutions, it is obvious that library resources are viewed as vital, daily resources to users at the five institutions in Woods Hole; however, the users may not be informed of the breadth of data services offered by the library including the data repository and the data management services. The information collected also confirms that users still enjoy receiving word of mouth information from their peers; however, they would also like to receive a monthly newsletter from the library informing them of library news, programs, and services.
Feedback received from Small Focus Group

A brief survey was sent to a small group of graduate students and a few institution employees in order to obtain some user feedback, as the library has not conducted user assessments in quite some time. Pictured below are a few of the results received from this small focus group.

How often do you use the MBLWHOI Library?
5 responses

I mostly use the MBLWHOI Library for:
5 responses
Several of the representatives at the Joint User Committee meeting, as well as all five of the participants in the focus group stated their interest in learning more about data management and how it would apply to their own research. They also expressed interest in learning about the data repository and the VIVO service. With zero percent of the focus group reporting using the library for data management and the repository, but being interested in learning more, it can be concluded that there are probably many users who are also not aware of all of the data services offered by the library that could positively impact their research. The proposed webinar would not only help to bring more information to users, which is an area that users spoken with describe as a potential personal benefit but would also teach users what the library has to offer, especially in respect to data management, preservation, and sharing.

**Benefits of the Webinar Series**

- Increased communication to users from the library
- Increased visibility of the library on the campuses
- Increased knowledge of the library’s data services
- Increased use of the data repository
- Knowledge of data management best practices
- Visual monthly contact with the library staff
- Low cost implementation for all involved parties (Library, users, institutions, etc.)

**Costs of the Webinar Series**

- Staff time for the implementation and marketing of the webinar
- Staff time for the presentation of the monthly webinar
- Staff time for the creation of marketing efforts, including the monthly newsletter, signage, etc.
- Staff time for assessment of the user needs and of the webinar topics and success
Risks of offering the Webinar Series

- The possibility of low attendance at the monthly webinar
- Increased staff responsibilities that will add on to an already busy workload
- Additional costs accrued for marketing and implementing the webinar
- Low user interest in the new program
- Monthly email newsletters received negatively by the busy user base
- Low response rates to user surveys regarding the library and the webinar program

While the benefits of the webinar not only align with each of the five institutions’ mission statements, regarding furthering knowledge and research within the scientific community, it also aligns with the library goals of attracting additional users, creating new “out of the box” services, and establishing ways to have better informed users. While there are risks in offering the series, including low user turnout, minimal interest in the webinar series, and potential negative feelings toward the library due to increased emails, the webinar has the potential to introduce concepts and services that can help each and every individual organize, manage, preserve, and share their research and data.

Establishing the program with strong marketing tactics and a focus on relevancy within the scientists’ own research will be key to avoiding any potential risks. The low cost associated with the webinar is also a benefit that can help to make the implementation risk less worrisome, as the library will be able to use Woods Hole Oceanographic Institution’s free webinar services (Webex) and will also be able to use the library staff’s knowledge to create presentations on the relevant topics to be presented. The appeal for users will be a service that provides them a convenient way to obtain information and tutorials so that they can engage with efficient, properly stored, and properly organized research and data.

Service Demands Estimate

The webinar program not only has the potential to increase usership, but it also has the potential to increase the demand and participation in data services that are offered by the library. It appears that many users are unaware of all of the data services that the library offers. By reaching out and meeting users in the comfort and convenience of their own offices and homes, the library can show their value and expertise when it comes to their collaboration and assistance in each individual’s research and data management. The potential that the webinar has to increase library usage is great, as more informed users will lead to an increase in library engagement and use.

Taking Action

Recommendation Outcomes

- **Goal:** Increase library communication to users across the five institutions in Woods Hole.
  - **Outcome:** The users will become well acquainted with all of the services and programs offered by the library.
- **Outcome:** The users will be able to identify the potential library services that could improve their research and data management.

- **Goal:** Increased presence of the library on all five campuses.

- **Outcome:** The users will identify the library as a vital resource for knowledge and research.

- **Goal:** To create better informed users regarding the library’s data management service and the data/institutional repository.

- **Outcome:** The users will demonstrate data best practice procedures based on the information they learn through the monthly webinar.

- **Outcome:** The users will be able to make informed decisions on when to use the Institutional Repository service for their research.

### Recommendation Budget

#### Employee Budget

<table>
<thead>
<tr>
<th>Description</th>
<th># of Employees</th>
<th># of Hours per Person</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requesting and setting up the Webex License w/ WHOI</td>
<td>1</td>
<td>1</td>
<td>$32.00</td>
</tr>
<tr>
<td>Any required meeting or training on Webex License and use</td>
<td>2-4</td>
<td>1</td>
<td>$128.00</td>
</tr>
<tr>
<td>Conducting user needs assessment to choose topics of interest and other areas of need (Creation &amp; distribution of survey)</td>
<td>2-4</td>
<td>1-2</td>
<td>$256.00</td>
</tr>
<tr>
<td>Compiling and analyzing the user survey data</td>
<td>2-4</td>
<td>2</td>
<td>$256.00</td>
</tr>
<tr>
<td>Creating a monthly webinar schedule for the year &amp; assigning library staff as hosts each month</td>
<td>2</td>
<td>1</td>
<td>$64.00</td>
</tr>
<tr>
<td>Staff meeting to discuss the service and to assign tasks, brainstorm marketing, etc.</td>
<td>9</td>
<td>1</td>
<td>$288.00</td>
</tr>
<tr>
<td>Designing a monthly email newsletter template</td>
<td>1</td>
<td>2-3</td>
<td>$96.00</td>
</tr>
<tr>
<td>Reserving institution space to host webinar each month</td>
<td>1</td>
<td>1</td>
<td>$32.00</td>
</tr>
<tr>
<td>Designing other signage/marketing materials</td>
<td>2-3</td>
<td>2</td>
<td>$192.00</td>
</tr>
<tr>
<td>Creating digital webinar sign-up sheets</td>
<td>1</td>
<td>1</td>
<td>$32.00</td>
</tr>
<tr>
<td>Distributing and installing signage to all 5 institutions</td>
<td>2</td>
<td>1-2</td>
<td>$128.00</td>
</tr>
<tr>
<td>Staff meeting to ensure all components are ready and working prior to the first webinar and that all staff know how to use the Webex platform</td>
<td>9</td>
<td>1</td>
<td>$288.00</td>
</tr>
</tbody>
</table>
Drafting of monthly email newsletter & webinar announcement/reminder 2 1 (a month) $64.00
Posting webinar information to social media (Facebook & Twitter) 1 1 (a month) $32.00
Submit information to Institution ListServs for sharing information about upcoming webinars 2 1 $64.00
Staff time each month to prep the presentation, host the webinar, and present 1-2 3 $192
Compiling and analyzing user feedback received during and after each month’s webinar 2-4 2 $256.00
Staff meetings occasionally to discuss the program and the feedback received, as well as any changes to be made 9 3 (per year) $864.00

Total Cost: $3,264.00

Materials Cost

<table>
<thead>
<tr>
<th>Material</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card stock for bulletin board signs- Assorted Colors 5 Reams (400/pack)</td>
<td>$135.00</td>
</tr>
<tr>
<td>Custom Posters (12” x 18”) Qty: 8-10</td>
<td>$100.00</td>
</tr>
<tr>
<td>Miscellaneous (Ink/printing costs, etc.)</td>
<td>$250.00</td>
</tr>
<tr>
<td><strong>Total Cost:</strong></td>
<td><strong>$485.00</strong></td>
</tr>
</tbody>
</table>

Supplies cost based on Staples.com

Webinar Production Costs

<table>
<thead>
<tr>
<th>Service</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Webex Enterprise Webinar Service</td>
<td>$0.00- Free to use for WHOI employees</td>
</tr>
<tr>
<td>Recording Fees</td>
<td>$0.00</td>
</tr>
<tr>
<td>Broadcast Fees</td>
<td>$0.00</td>
</tr>
<tr>
<td>Video Storage Fees</td>
<td>$0.00- Unlimited storage is provided</td>
</tr>
<tr>
<td><strong>Total Cost:</strong></td>
<td><strong>$0.00</strong></td>
</tr>
</tbody>
</table>

Webinar cost based on WHOI memo regarding Webex service.

**Total Projected Cost for Recommendation:** $3,649.00

Responsible Parties

All staff members will be expected to assist in the planning, implementation, marketing, presentation, and dissemination of the webinar program. Each staff member will be required to
contribute their specific areas of expertise to create and host webinar presentations that meet the needs of the library’s users. The success of the program will depend on the teamwork and collaboration that all library employees participate in.

Library Co-Directors
Main Goal: Oversight of the entire program, including user needs assessment
1. Co-Director for WHOI will need to contact the Information Services Department to request a Webex License for the library
2. Assist library employees with the creation and analysis of a user needs assessment survey
3. Oversee the creation of the webinar schedule including which employees will present particular topics, as well as comparing that to the results of the user needs assessment
4. Host staff meeting to discuss the webinar schedule and program
5. Ensure that all library employees are proficient with the Webex platform
6. Co-Director for WHOI will need to reserve institution space for hosting the live webinar
   a. Ensure that a room is used with technology that will enable Webex broadcast.
7. Oversee the marketing that is being designed and distributed for the webinar program
8. Host a staff meeting prior to the first webinar to ensure software and equipment is working and that all staff are prepared
9. Send out the monthly email newsletter that outlines the month’s webinar as well as other library news
10. Submit webinar information to the ListServs at as many of the institutions as possible
11. Assist in hosting the webinars and present on topics of expertise
12. Assist in the compilation and analysis of user feedback during and after each webinar
13. Conduct periodic staff meetings to ensure that the program is running smoothly and to analyze the success based on user feedback

Technical Services Coordinator
1. Assist with any technical implementation logistics
2. Assist other library staff in the drafting of the user needs assessment survey
3. Assist other library staff in marketing brainstorming and creation
4. Provide information and resources for webinars that focus on the library’s collections, including those about preservation and present during webinar
5. Attend staff meetings to provide support and insight into the webinar program and its potential

Senior Automation Services Officer
1. Assist other library staff in the drafting of the user needs assessment survey
2. Assist other library staff in marketing brainstorming and creation
3. Ensure that all webinar attendees will be able to access the webinar recordings on the library website
4. Provide information and resources for webinars that touch on topics of citation management and present during webinar
5. Attend all staff meetings to provide support and insight into the webinar program and its potential

**Resource Sharing Librarian**
1. Assist other library staff in the drafting of the user needs assessment survey
2. Assist other library staff in marking brainstorming and creation
3. Provide information and resources for webinars that touch on resource sharing topics, including questions regarding the library catalog and present during webinar
4. Attend all staff meetings to provide support and insight into the webinar program and its potential

**Institution Archivist**
1. Assist other library staff in the drafting of the user needs assessment survey
2. Assist other library staff in marketing brainstorming and creation
3. Provide information and resources for webinars that touch on WHOI’s archives and present during the webinar
4. Attend all staff meetings to provide support and insight into the webinar program and its potential

**Data Librarian**
1. Assist other library staff in the drafting of the user needs assessment survey
2. Work closely with the co-directors on the implementation of webinars that deal with the data services
3. Design the email newsletter template for monthly library newsletter dissemination- including a webinar logo
4. Assist other library staff in marketing brainstorming and creation
5. Provide information and resources for webinars that touch on the data services provided by the library and present during the webinar
6. Attend all staff meetings to provide support and insight into the webinar program and its potential

**Publication Services Coordinator**
1. Assist other library staff in the drafting of the user needs assessment survey
2. Work closely with the co-directors on the implementation of webinars that deal with copyright, open access and WHOAS
3. Assist other library staff in marketing brainstorming and creation
4. Provide information and resources for webinars that touch on the copyright, open access, and WHOAS program and present during the webinar.

5. Assist library co-directors by providing information and resources for webinars that could be directed toward library orientation for new students and employees.

6. Attend all staff meetings to provide support and insight into the webinar program and its potential.

**Systems Librarian**

1. Assist other library staff in the drafting of the user needs assessment survey.

2. Assist other library staff in marketing brainstorming and creation.

3. Provide software assistance for webinar implementation and preservation on the library’s website.

4. Attend all staff meetings to provide support and insight into the webinar program and its potential.

**Action Plan & Timeline**

**User Needs Assessment Plan & Timeline (January- March 2019)**

1. Design a user assessment tool through a digital tool like Google Forms.

2. Create questions that will allow users to share their thoughts on current library services, share their outstanding needs, and identify areas that they would like to see the library focus on and engage in.

3. Determine if an incentive can be offered to users that will encourage them to provide feedback in the survey:
   a. Discuss the possibility of offering a coupon for a free cup of coffee at the local Woods Hole Coffee Obsession shop.

4. Create marketing tools for the user survey, such as signage that can be posted around the institutions to promote the survey as well as the free coffee as a thank you for participating:
   a. Ensure that the signage reveals the benefit to the user in participating the survey.

5. Distribute the survey link via email to all library users across all five institutions:
   a. The survey may need to be distributed to the representatives of the other institutions for full dissemination to all library users.

6. Allow for a 2-3 week window to receive the maximum number of responses.

7. Compile all results for analysis:
   a. If using Google Forms, the software will compile multiple choice questions into easy to decipher graphs.
   b. Short answer/long answer questions will have to be examined and recorded by library staff to be able to share the results and value areas identified.

8. Host a staff meeting to discuss the user assessment findings and to identify topic areas that would be relevant and beneficial to a large portion of the users.
a. These topics would then assist in the creation of webinar topics for the coming year
9. Apply the user needs assessment results to other areas of the library, as necessary

**Webinar Program Development (March- May 2019)**
1. Request a Webex License from the Woods Hole Oceanographic Institution’s Information Services Department
2. Co-directors attend a meeting with the Information Services Department, if any Webex training is required/offered
   a. Share this new knowledge with library staff
3. Create a webinar schedule that will include topics identified by the user needs assessment that will meet relevant needs for the user community
   a. Determine which staff member(s) will be responsible for hosting webinars based on their areas of expertise
   b. Choose a day of the week/part of the month that can serve as the designated library webinar day
      i. Ex: Every third Wednesday
4. Host a staff meeting to assign tasks and to discuss the marketing of the program

**Communication & Marketing (May 2019- July 2019)**
1. Design a monthly email template that can be updated each month to reflect new library news and a summary of the month’s webinar topic
   a. Be sure to include the MBLWHOI Library logo, as well as the logo or image created for the webinar series
2. Create a digital webinar sign-up sheet
   a. Provide a link to this sign-up sheet in the monthly newsletter
3. Create several poster/flyer designs for signage within the institutions for the webinar series
   a. 8.5 x 11 for bulletin boards printed on colorful paper
      i. Should be subject specific
   b. Create several large-scale webinar posters that can be posted in the library and within a common space in each institution
      i. This poster can just promote the series overall
4. Distribute flyers and posters to the various institutions a month prior to implementation
   a. This could be done by providing the materials to each institution’s representative or could be done via a librarian visit to the institution.
5. Submit information about the webinar to the institution ListSerts for inclusion in the institutions’ newsletter email prior to the webinar
   a. Ideally, this would happen a couple weeks before the webinar.
6. A week prior to the webinar, distribute the library newsletter email to all library users.
   a. If there is pushback by individuals regarding a mass-email, those that want to continue receiving emails can sign-up with the library to be on the newsletter email list.
7. Conduct a staff meeting with staff members who will be presenting that month to ensure there are no questions regarding the webinar platform, or content that will be presented.
8. At the beginning of the week of the webinar, post to Twitter and Facebook to promote the webinar event.
   a. Be sure to include specific details on the topic that will be covered.
   b. Images used for the marketing flyers could also be used within the social media posts.

**Webinar Implementation (First Webinar to begin in August 2019)**
1. Request/reserve a space at WHOI to host/broadcast the webinar, if necessary
2. The staff member responsible for the month’s presentation should create an interactive presentation a couple of weeks ahead of time in order to have time to review prior to webinar.
   a. This also allows time for Q & A with library co-directors and other library staff.
3. On the day of the webinar, the staff member should be signed in to Webex and ready to receive attendees 15 minutes prior to the start time.
   a. Webinar hosts should plan on a full hour: presentation time, Q & A with attendees, and closing remarks/feedback
   b. Share a link within the webinar chat box to survey participants at the end of the webinar and ask for feedback
4. After the webinar, compile user feedback and data.
5. Draft an email to staff members to summarize the month’s webinar and to deliver any user feedback that can be used toward the next webinar, or other library services.
6. Meet with staff members, if necessary, to discuss their work as webinar host that month.

**Pilot Provisions**

During the implementation phase of this webinar program, the first few months could be used as a pilot period that would allow the library to determine positive user reception of the program. Various communication efforts may need to be experimented with to determine the mode of communication that is most convenient and accepted by the library user base. The first few webinars will act as a pilot test to ensure that the communication, marketing, and implementation of the webinar program is a successful venture for the library and provides a service that meets relevant needs for library users. After the initial three-month period, a staff meeting could be planned to assess the user survey data, the participation numbers, and user feedback to determine if creating a continuing schedule for the program would be the best way to use staff time and library resources to meet the community’s needs.

**Scalability**

The success of this program will be determined by a high level of communication between the library and the library users at the five institutions in Woods Hole. The design of this project
allows the service to be provided without great need to modify the procedures or plan regardless of the number of participants.

Low use of the program will require the library staff to reevaluate current communication avenues, including email, social media, and promotional signage within the institutions. High use of the program may require additional library staff time to plan for webinar events and to assess the feedback from users. The project plan for this program is flexible to be able to accommodate both high and low interest.

**SWOT Analysis**

<table>
<thead>
<tr>
<th>Strengths:</th>
<th>Weaknesses:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✦ Dedicated library staff</td>
<td></td>
</tr>
<tr>
<td>✦ Library is already focused on providing strong service and resources that further the scientific discovery being made</td>
<td></td>
</tr>
<tr>
<td>✦ Data services that will positively impact users and their research</td>
<td></td>
</tr>
<tr>
<td>✦ Users identified need and desire to learn more about the library’s data services, and other library news</td>
<td></td>
</tr>
<tr>
<td>✦ Unforeseen technical issues when setting up the Webex License and hosting the webinar</td>
<td></td>
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<tr>
<td>✦ Limited library budget</td>
<td></td>
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<tr>
<td>✦ Additional library communication seen as annoyance by faculty &amp; students</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities:</th>
<th>Threats:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✦ Increased communication between the library and its users</td>
<td></td>
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<tr>
<td>✦ Ability for the library to determine need areas for the users</td>
<td></td>
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<tr>
<td>✦ Attracting more users to the library</td>
<td></td>
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<tr>
<td>✦ Creating better informed user base</td>
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<tr>
<td>✦ Ability to share library value with library users</td>
<td></td>
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<tr>
<td>✦ Provision of convenient instruction to library users</td>
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<tr>
<td>✦ Library users might not embrace and/or participate in the new program.</td>
<td></td>
</tr>
<tr>
<td>✦ The new program may take library staff time from other services and programs.</td>
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<tr>
<td>✦ Lack of enthusiasm from library staff for the webinar program</td>
<td></td>
</tr>
<tr>
<td>✦ Minimal feedback received from library users to help create a relevant webinar schedule</td>
<td></td>
</tr>
</tbody>
</table>

**Assumptions**

- Library stakeholders will be receptive to the webinar program, as they would like to learn more about what the library has to offer, especially regarding data services.
- The results of the focus group are representative of the overall climate in all 5 institutions.
- The library would like to engage in increased communication efforts with their library patrons.
- The library would like to identify the needs of their community.
- The library will be able to create a free Webex account via Woods Hole Oceanographic Institution.
Library stakeholders will positively react to increased communications from the library.
A lunch time webinar program will easily fit into the schedules of most stakeholders.

Limitations
- The ability for the webinar program to be supported by the library’s budget.
- Library staff time to develop and implement the program.
- The willingness of the members of the 5 institutions to respond to the user needs assessment survey.
- The ability to identify fresh new topics for the monthly webinar.
- The webinar will only be successful if communication and marketing are increased.
- Only graduate and post-doc students respond to user survey and attend the monthly webinar.
Communication & Marketing Plan

Introduction

The MBLWHOI Library currently has several ways it communicates and markets services and programs to its user community. The most recent and successful communication tool used by the library was the creation and implementation of flyers that were posted around several of the institutions. The library staff worked together to design flyers with catchy phrases and clever sayings to share the library’s impact and value. The library also uses ListServs offered by the Communication Departments within the two main institutions (Marine Biological Laboratory and Woods Hole Oceanographic Institution) to share big library news, as well as to advertise meaningful programs. The social media accounts for the library (Facebook & Twitter) are updated several times a week to mark significant events in the institutions’ history, and to also share new services and programming. The MBLWHOI Library website is always updated to reflect current offerings and library news.

One of the best ways the library ensures that communication efforts are made to all five institutions is by having an established Joint User Committee that meets several times a year. At committee meetings, the library discusses how they are working to meet user needs, the types of programs and services the library is currently working on, as well as to share the resources the library currently offers that can positively impact the library’s entire user community. Both the library staff and the library users identify word of mouth communication from colleagues as a continued powerful tool in sharing the value and impact that the library can have on individual research careers. As the webinar program is implemented, it will be vitally important to continue all current avenues of communication, and to create a few new ones, in order to increase and sustain awareness and participation in not only the webinar but also within all library programs and services.

Communication/ Marketing Outcomes

- **Goal:** Increased awareness of the webinar series
  - **Outcome:** Users will be able to identify the webinar as a source of information on how the library can meet the research and data needs of its users.
  - **Outcome:** Users will attend the webinar more frequently as a result of the marketing efforts for the webinar series.
  - **Outcome:** Webinar participants will verbally recommend the webinar series to other students and faculty.

Internal Target Audiences for Communication & Marketing Efforts

- Library Co-Directors
- Technical Services Coordinator
External Target Audiences for Communication & Marketing Efforts

For each audience group, communication and marketing will be directed at those who currently use the library and its services, as well as to those who do not currently use the library across the five institutions.

- Practicing Scientists
- Graduate and Post-Doc Students
- Research Faculty
- Guest Students
- Remote Scientists & Students
- Instructors/Lecturers
- Joint User Committee

Positioning Statement

The MBLWHOI Library offers numerous resources and services that help to meet the educational and research needs of the Woods Hole Scientific Community. Through the webinar series, the library will be able to increase target audience awareness of the services at the library, thus resulting in an increase in the number of users served by the library. The webinar will allow the library to make an even greater impact on the scientific careers of all individuals within their community.

Key Messages

**Library Staff & Co-Directors**

- Increased marketing and communication will increase the visibility of not only the library, but also the services and resources provided to our users
- Increased user participation and total number of users served
- Improved ability to share the values and impacts of the library

**Practicing and Remote Scientists**

- Increased awareness of how the library can assist you with your research needs
- Increased awareness of the library’s collection, preservation, and sharing of the scientific output of the Woods Hole Scientific Community

**Graduate, Post-Doc, Guest, and Remote Students**
✓ Ability to see how using the library’s resources can improve your research output and positioning within your field
✓ Ability to learn about the data resources and programs that will provide you with important information on data management, which will have a positive and lasting impact on your current and future career

**Research Faculty**

✓ Will view the library as an essential resource in your research cycle
✓ Will identify the library as a viable resource for the management and preservation of your data

**Instructors/Lecturers**

✓ Will be able to identify the library’s ability to meet the educational and research needs of both you and your students

**Join User Committee**

✓ The ability to increase the awareness of the library and its resources to your institution’s users
✓ Ability to collaboratively work with the library to meet the needs of your users
✓ Increased communication between the library and your institution

**Message Delivery Strategies**

**Tools**

⇒ **Institution ListSers**
  - Information will continue to be submitted to institution ListServ communication services in order to invite the scientific community to various library events and to share important library news
  - Increase shared information to all five institutions’ ListServ Communication services

⇒ **Library Monthly Newsletter Email**
  - A monthly newsletter will be created in order to share the topics of the month’s webinar series, important library resources, and new library information.
  - The newsletter will also include links to the webinar schedule, and the library’s website.
  - The newsletter will also provide links and information regarding the user needs assessment.

⇒ **Posters/Flyers**
  - Flyers will continue to be created and posted on bulletin boards around the institutions.
    - Colorful paper will be used along with images as necessary
• Posters will focus on sharing the monthly webinar series and its various topics
  o Larger posters will be created and posted within each institution’s community spaces, such as the lobby, to invite members of the community to attend the webinar series.
  o All flyers and posters will be distributed to all five institutions for installation.
  o Flyers will be created for both the user needs assessment and the webinar series.

⇒ **The Library’s Website**
  o The Library News and Projects section on the homepage of the MBLWHOI Library website will be updated to include a link to the webinar schedule and topic areas.
  o A link will be provided on the library website’s homepage that will allow users to provide feedback and to report their needs based on what was covered within the webinar series. This will encourage even greater communication between the library and its users.
  o The homepage will also provide a link to the library’s user needs assessment survey.

⇒ **Social Media**
  o The library’s Facebook and Twitter accounts will be updated a week prior to the webinar, the week of the webinar, and the day of the webinar in order to advertise and invite people to participate.
  o Each post will have a catchy image and will give a brief statement about the topic and time of the webinar. A statement will be written to welcome everyone to this free resource.
  o Social media posts will also be used to encourage participation in the library’s online user needs survey.

⇒ **Word of Mouth**
  o The webinar program will be verbally shared by library staff to department administrative assistants and to library users that they come in contact with.
  o Since this is still a very important way for the Woods Hole Scientific Community to share information, it will be vitally important to discuss the webinar program to encourage participation and excitement.

**Action Plan & Timeline**

This plan and timeline will follow along with the plan and timeline located in the previous section which encompassed the project plan.

**User Needs Assessment Marketing & Communication (January -March 2019)**

1. Library staff will brainstorm design ideas for the user survey and its corresponding posters, social media posts, flyers, newsletter, and library website links.
2. Use a coupon for a free cup of coffee at the local coffee shop as the main attractive incentive for users to participate
a. Design the marketing materials to prominently show incentive of a free cup of coffee for increased participation
3. Designated library staff will work together to create flyers and posters that will be posted at all institutions
4. Create two email messages to share the survey link with users
   a. One email should target the practicing scientists and faculty
   b. The second email should target students
   c. Include information on the free cup of coffee for participation
5. Post to social media using a photograph and a catchy phrase to encourage participation in the user survey
   a. Include info on free cup of coffee

**Webinar Program Development Communication (March-May 2019)**
1. Designated library staff members will help create and design the webinar calendar
   a. This calendar should be posted along with the flyer about the webinar series.
2. Staff members will be assigned tasks as necessary for the design and implementation of the webinar, including presentations, making flyers, creating emails, etc.
3. A staff meeting will be held to discuss the implementation of the program and the corresponding responsibilities.

**Webinar Communication & Marketing (May 2019- July 2019)**
1. Library staff, or designated staff member, will create a monthly email template that will be updated each month to reflect library news and the month’s webinar event and topic.
   a. The library logo and the webinar image/logo should be included in the template.
2. Creation of a digital sign-up sheet
   a. Link to sign-up sheet should be in the newsletter and on the library website’s homepage.
3. Two to three designated library staff members will design the flyers and posters that will be used to share information on each month’s webinar.
   a. Each month’s poster should be slightly different and should highlight the topic of the month
   b. All flyers will include the day of the month the webinars are offered (ex: every third Wednesday).
   c. All flyers should be on colorful paper (8.5 x 11 in. for bulletin boards).
   d. Larger posters should be created for institutions’ common spaces (ex: lobbies).
      i. These posters will advertise the overall webinar series rather than each individual topic.
   e. Images and logos should be included on the posters as well as the library’s contact information and website.
   f. Posters will be printed at Staples, unless one of the institutions has the capability.
      i. Flyers can be printed by the library or by Staples.
4. Library staff should work together to create or find images that can be used for the flyers and/or social media posts.
5. Once the flyers and posters have been designed, created, and printed, they will need to be distributed to the five institutions via their Joint User Committee representative or via a librarian visit to the institution.
6. Create a social media post for the first month’s webinar that will include a photograph and a short statement to encourage participation based on the topic to be covered.
7. A statement will be created by the co-directors to include in each of the institutions’ ListSers or Institution-wide newsletter. This statement can conclude with a link to the webinar information on the library’s website.
   a. Along with the statement will be a copy of the webinar flyer or logo.
8. Approximately one week prior to the webinar, the library’s newsletter template should be updated to reflect information on the first webinar to be held and should be emailed to all students and staff at all five institutions.
   a. The email should be sent a week prior to the webinar.
9. Reminder social media posts should be posted the week of the webinar that will include the month’s webinar’s image and a short statement on the topic.
   a. Posts should encourage attendance and additional opportunity to sign-up.

**Webinar Implementation Communication and Marketing (August 2019)**

1. A Google form should be created to survey users after each webinar.
   a. The link to this survey should be shared to participants either through the webinar chat box, or via email (to participants only) the afternoon after the webinar is held.
   b. The questions can be as simple as:
      i. Was this webinar useful?
      ii. Was the webinar engaging?
      iii. Is there anything that we could do to improve the delivery of the webinar?
      iv. Did the webinar answer any questions you have regarding the topic/service presented?
      v. What other topics would you like the webinar series to discuss?
      vi. How likely are to you participate in another webinar?
      vii. How likely are you to encourage your peers to participate?
2. Once data is collected from the survey, an email will need to be drafted and sent to library staff to update everyone on the successes of the webinar and of any changes that can be made prior to the next month’s event.

**Marketing Budget**

The budget for the marketing and communication of the project was included within the project budget which is located within the previous section. The budget includes both the cost for staff time as well as marketing materials.

**Responsible Parties**

All library staff are expected to support and help each other with the creation of the communication and marketing tools that will be used to support the webinar series. Each staff member will use his/her area of expertise to help accomplish all required communication and marketing tasks.

**Library Co-Directors**

1. Assist library employees with the creation and design of not only the user needs survey, but also the required communication/marketing efforts.
   a. This includes approving signage, emails, and social media posts
2. Help create the webinar series calendar and help in its distribution to the five institutions.
3. Host staff meetings to discuss the webinar series implementation, staff responsibilities, marketing, software, etc.
4. Oversee all marketing and communication efforts for the webinar series
   a. This includes flyers, posters, emails, social media posts, ListServ announcements, and the library website
5. Submit webinar information to ListServs/institution newsletters at all institutions each month
6. One week prior to the webinar event, send out edited monthly newsletter that outlines the library’s news and the webinar topic of the month.
7. Verbally share and promote the webinar program with colleagues, students, and scientists
8. The approximate time commitment for the communication and marketing tasks required in order to implement the series is 10-12 hours. The time will be much less (3-5) once the webinar series has started and monthly requirements only involve email, Listserv posts, distribution of new flyers, and program oversight. This time will also be split between the two Co-Directors.

**Technical Services Coordinator**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Assist library staff with the creation of the marketing tools for the webinar series
3. Attend staff meetings
4. Verbally share and promote the webinar program with colleagues, students, and scientists
5. Approximate time commitment: 2-3 hours

**Senior Automation Services Officer**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Edit flyers, emails, and social media posts for the citation management webinar
3. Assist library staff with the creation of the marketing tools for the webinar series
4. Attend staff meetings
5. Verbally share and promote the webinar program with colleagues, students, and scientists
6. Approximate time commitment: 3 hours

**Resource Sharing Librarian**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Edit flyers, emails, and social media posts for a webinar dealing with resource sharing, if applicable
3. Assist library staff with the creation of the marketing tools for the webinar series
4. Attend staff meetings
5. Verbally share and promote the webinar program with colleagues, students, and scientists
6. Approximate time commitment: 3 hours
**Institution Archivist**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Edit flyers, emails, and social media posts for webinars dealing with WHOI’s archives
3. Assist library staff with the creation of the marketing tools for the webinar series
4. Attend staff meeting
5. Verbally share and promote the webinar program with colleagues, students, and scientists
6. Approximate time commitment: 3 hours

**Data Librarian**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Design the email newsletter template for the monthly newsletter
   a. Includes both the library logo and the webinar logo
3. Edit flyers, emails, social media posts for webinars dealing with the data services provided by the MBLWHOI Library
4. Assist library staff with the creation of the marketing tools for the webinar series
5. Attend all staff meetings
6. Verbally share and promote the webinar program with colleagues, students, and scientists
7. Approximate time commitment: 4-5 hours

**Publication Services Coordinator**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Edit flyers, emails, social media posts for webinars dealing with copyright, open access and WHOAS
   a. Also help with any webinar communication and marketing for potential webinar for library orientation for new students and staff
3. Assist library staff with the creation of the marketing tools for the webinar series
4. Attend all staff meeting
5. Verbally share and promote the webinar program with colleagues, students, and scientists
6. Approximate time commitment: 3-4 hours

**Systems Librarian**
1. Assist library staff with the creation of the user needs survey and its associated communication and marketing
2. Assist library staff with the creation of the marketing tools for the webinar series
3. Assist all staff with support for posting webinar information to the library’s website
4. Attend all staff meetings
5. Verbally share and promote the webinar program with colleagues, students, and scientists
6. Approximate time commitment: 3-4 hours
Mockups of Communication/ Marketing Methods

**Mock-up Logo Designs:**

![Mockup Logos](image1.png)  
![Mockup Logos](image2.png)

**Social Media Post Mock-up:**

“Join us this Wednesday, August 21st at 12pm as we introduce our webinar series! This month’s topic is data management. Come learn how the MBLWHOI Library can help you with your data. All are welcome, come from wherever you are, and bring your lunch! Please visit our website for more details.  

- The following image is an example of what could be included in the post. Including a picture with the post will attract more users.

![DMP Tool](image3.png)

**Institution ListServ Mock-up:**

- If the ListServ is being sent by the library and will encompass the entire email message, the library can use a virtual copy of the webinar flyer for this ListServ message.
- If the library is submitting a message to be a part of an announcements ListServ or institution newsletter, a short statement and the webinar logo should be presented.
Example Statement for ListServ:

The MBLWHOI Library is proud to announce our new webinar series that will be held every 3rd Wednesday and will tackle topics such as data management, the Open Access Server (WHOAS), and the data repository. We invite you to attend our first webinar on August 21st as we discuss our data management services, including our new DMP Tool Project. Sign in from wherever you are and bring your lunch - we hope to see you there!

For more details, please visit our website at mblwhoilibrary.org/webinar

Example Flyer for the Webinar Series:

Aug. 21 — Data Management

Join Audrey Mickle as she updates us on the new DMP Tool Project, and answers questions about how to sustainably manage data for the future.

For more information: visit mblwhoilibrary.org/webinar
Example Poster for Institution Lobbies:

THE MBLWHOI LIBRARY PRESENTS

Webinar Series

DATA MANAGEMENT
AUGUST 21, 2019
12PM - 1PM • VIA WEBEX MEETING SOFTWARE
PLEASE JOIN US FROM WHEREVER YOU ARE AND BRING YOUR LUNCH!

MBLWHOILIBRARY.ORG/WEBINAR
The Lunch & Learn Webinar Series Kickoff 8/21/19

Fostering Collaboration with the MBLWHOI Library

The MBLWHOI Library is proud to announce our new webinar series that will be hosted at noon on the 3rd Wednesday of every month and will tackle topics such as Data Management, the Open Access Server (WHOASL), and the Institutional Repository. We invite all members of the Woods Hole Science Community to attend.

Our goal is to create a webinar series that will tackle topics that are most relevant to the research taking place in Woods Hole. We want our webinar series to provide a space where the library can collaborate with users to share ideas and to provide information and resources that will further the academic success being experienced within our community.

Our first webinar will be held via Webex on August 21, 2019. We invite everyone to join our Data Librarian, Audrey Middle, as she provides updates on our new DMP Tool Project and answers any questions on how to sustainably data for the future.

If you have any suggestions on topics you would like to see discussed within the webinar series, please share those at www.mblwhoilib.org/webinar.

We hope to see everyone on August 21st!
Assessment of Value & Impact Plan

Introduction

To ensure continued success of the services and programs provided by the MBLWHOI Library, it is important that the library assess their value and impact with their users on a regular basis. Conducting assessment with the users of the library has proved difficult in the past, as many users have full schedules that do not allow for extra time to be given to tasks that are not directly related to their research. By employing methods that virtually meet users where they are, assessment can be non-obtrusive and can capture the thoughts and feelings of many more users.

Conducting focus groups and collecting circulation data will still be very important aspects of the MBLWHOI Library’s assessment goals; however, adding in carefully-worded and brief virtual surveys will round out the information collected and will allow for the library to gain additional knowledge on what impacts they are making on their users, what else the users need, and how their users value their services and resources. The assessment for the webinar series will also help to show how resources are being used, whether the library is serving more users, and if the users are better informed of all of the resources that the library can offer to their research endeavors. This will allow the library to continue to closely follow their strategic goals and will allow them to refine and pinpoint their current impact areas, as well as identify areas of improvement for their next strategic planning exercise.

The webinar series is proposed to meet these three main goals:

- Increased library communication to users across the five institutions in Woods Hole
- Increased the presence of the library on all five campuses
- Create better informed users regarding the library’s data management service and the Institutional Repository

Each goal is associated with particular user outcomes that the library is striving to achieve by implementing the webinar series. Below are the outcomes associated with webinar series in the order of their priority in this assessment plan.

Recommendation Outcomes

1. **Outcome 1:** The users will identify the library as a vital resource for knowledge and research
   
   a. This outcome is a top priority, as the library’s continued value across the five campuses derives from the value perceived by its users. It is important that the webinar series shares the many ways in which the library can help to meet the needs of the user from the beginning of their research to the safe keeping of their final products.

2. **Outcome 2:** The users will be able to learn about all services and programs offered by the library
a. This outcome is closely related to the previous outcome, but specifically relates to the user’s ability to have a convenient platform in which they can learn about what the library offers. It is important that the user’s ability and willingness to learn through the webinar be a top priority of the assessment.

3. **Outcome 3:** The users will be able to identify the potential library services that could improve their research and data management

   a. This outcome builds upon the first two outcomes as it is the result of the user’s ability to identify the library’s value and services through the webinar series. It is important that the increased communication and sharing of the library’s services and programs be met with the user’s ability to identify how the library can meet their own personal needs, whether they be research related or directly related to their data management skills or lack thereof.

4. **Outcome 4:** The users will demonstrate data best practice procedures based on the information they learn through the monthly webinar

   a. This outcome builds upon the outcomes discussed so far, as it directly relates to the applied knowledge learned from the webinar session(s) that address data management. Based on the information learned, the library value perceived, and the services identified as beneficial to the career of the user, applying that learned knowledge will be key in creating lasting impact and value for the user. If users are able to learn more about the library and its services, then they should be able to take the knowledge learned and apply it to their own endeavors.

5. **Outcome 5:** The users will be able to make informed decision on when to use the Institutional Repository service for their research

   a. Even though this outcome is of the lowest priority when compared to the other program outcomes, it is vitally important that through the knowledge collected via the webinar series (especially on topics related to data) that the users are able to determine how the library’s repository can house, preserve, and share their research output.

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**Assessment Plan for Outcomes**

**Outcome 1:** The users will identify the library as a vital resource for knowledge and research

**Target Audience**

The target audiences of this outcome are the practicing scientists, graduate students, visiting scholars and students, research faculty, instructors, and administrative professionals from across all five institutions in Woods Hole.
Methods & Tools for Evidence Collection
Usage Statistics, Informal Conversations & User Surveys

**Library Use Statistics**
- The library’s usage statistics will be evaluated to identify any increases in the frequency of library use by the scientific community. It is expected that the library will attract more users to the library because the users have more knowledge on all resources offered by the library.

**Informal Conversations**
- The library currently receives information about user success due to library resources from the informal conversations had with users. These conversations will be an important factor in determining if the library is a top resource for users within their research. Informal conversations with colleagues, other scholars, and institution employees will also shed light on the status of the library as a major resource for its community. Information collected via informal conversations will be inputted into a spreadsheet created by the library to capture verbal user feedback.

**User Surveys**
- User surveys will be employed as part of the user needs assessment that will take place prior to the implementation of the webinar series, but surveys will also be distributed after each monthly webinar to continuously gather user feedback in relation to the knowledge learned through the webinar. The user survey at the end of each webinar will be brief but will include a question that will have the users rank the library’s position in their research cycle. All user surveys will be distributed virtually via email to webinar participants.

**Suggestions for Pilot Assessment**

As part of the library’s user needs assessment, a similar question regarding the library’s position in the user’s research cycle will be deployed in order to get a sense of the current view of the library. This question can be reused for the user survey that will be distributed at the end of each monthly webinar. A small focus group of library users can be used to pilot the survey. This will ensure that questions are easy to understand and answer, but also that the questions will provide the library with a useful amount of information that can show the value and impact the library had both before and after the webinar series.

**Alternative Methods & Tools**
- **User interviews**
  - To assess the library’s role in the user’s research cycle
  - Will provide more detailed information regarding not only the position of the library in the user’s toolbox of resources, but could also provide context as to why the user views the library in a particular way
  - The added context provided by the interview could fill any gaps seen with the user survey.
- **Focus groups**
  - Used to determine the library’s resource status with its users
  - Would unfold much like an individual user survey
Would glean a more robust amount of information in a shorter amount of time when compared to the individual interview method.

Analysis of Evidence

The library Co-Directors and/or designated library staff members will take the collected data from the usage statistics, the informal conversations, and the user surveys and will separate the qualitative and quantitative information before inputting the information into an excel spreadsheet. If Google Forms, or similar software, was used for the user surveys, graphs can be generated to reflect those results; however, it would be most beneficial to compile all data from all three sources into one spreadsheet in order to accurately display all feedback collected from users. Transferring the numbers into easy to understand visualizations will be key for reporting the data to both the library staff and its users.

How Assessors Will Know the Outcome Has Been Met

This outcome will be met when at least 60% of all webinar participants report that they identify the library as a vital resource within their research cycle.

Result Scenarios & Decision-Making Indicators

**Successful**

- **Result:** 60%-100% of webinar participants identify that the library is a vital resource within their research cycle
- **Decision:** The webinar series is successfully portraying the value of the library through the webinar series.

**Moderately Successful**

- **Result:** 40%-59% of webinar participants identify that the library is a vital resource within their research cycle
- **Decision:** The webinar series is portraying some of the value that the library can offer to users; however, a reevaluation of how the information is shared, as well as the topics that are being discussed could help retrieve better results. The library will need to ensure that the topics covered by the webinar are those that are relevant and needed by the library users.

**Unsuccessful**

- **Result:** 0-39% of webinar participants identify the library as a vital resource within their research cycle
- **Decision:** If a low percentage of participants view the library as a vital resource within their research cycle, the webinar is not successfully sharing library value through the webinar. The user needs assessment data will need to be reevaluated and the program will need to be restructured in order to meet the needs of the library users.
Suggestions for Reporting

After the analysis of the data collected by the user surveys, the informal conversations, and the usage statistics, it will need to be compiled and reported to library staff.

- **Important themes and compelling quotes** from the short answer questions within the user surveys and within informal conversations need to be collected and placed in an excel worksheet, or within a Word document.
- For the quantitative data, **visualizations** are a great way to show impact and value.
- Using a **pie chart** to show the percentage of participants who view the library as a vital resource make it easy to see whether the program has been successful in relaying library value, or if a reevaluation of the structure of the webinar series is needed.
- A **bar graph** of the multiple choice and list questions from the user survey would also be an easy and quick way to share the data.
- The charts and summary of themes and quotes will need to be emailed out to library staff for review and discussion but will also need to be included in the library’s year-end report.
- When the charts and summaries are included in the year-end report, it will be important to ensure that all data collected at the end of each webinar is reflected.

Responsible Parties

The library Co-Directors along with a couple of designated library staff members, such as the Data Librarian and the Resource Sharing Librarian, will be the ones responsible for compiling the data, inputting it into a spreadsheet, and producing a chart of the results. The Co-Directors will disseminate the information to their staff and any user groups as required.

Timeline

**Three Months Prior to First Webinar (May 2019)**
- Draft questions for the user survey that will be emailed to all webinar participants 24 hours after the webinar
- Ensure there are many types of questions drafted for the survey including multiple choice, short answer, and ‘other’ options
- Organize who will be involved in the pilot testing for the survey (library staff, students, administrative assistants, etc.)

**Two Months Prior to the First Webinar (June 2019)**
- Distribute the user survey to the pilot group for completion and feedback
- Require all responses to the survey be submitted back to the library with a week
- Once feedback from the pilot group has been received, compile and organize their feedback into an excel worksheet

**One Month Prior to the First Webinar (July 2019)**
- Discuss the feedback received from the pilot testing between library Co-Directors and the designated library staff who are responsible for creating the user surveys
- Make any edits required and finalize the survey template for distribution to webinar participants
24 Hours after the First Webinar Takes Place (August 2019)
- Distribute the user survey to all webinar participants via email

One Week After the First Webinar (August 2019)
- Review and compile the results from the user survey
- Review any feedback that was received via informal conversations
- Retrieve library usage data from the last month
- Input all data received into an excel worksheet
- Create charts and visualizations of the data

Two Weeks After the First Webinar (September 2019)
- Disseminate visualizations of the data to library employees
- Discuss results with library employees as required
- Reevaluate the structure of the program when comparing it to the survey results and make any changes necessary prior to the next month’s webinar

The same survey process will be completed 24 hours after each monthly webinar.

Outcome 2: The users will become well acquainted with all of the services and programs offered by the library.

Target Audience

The target audiences of this outcome are the practicing scientists, graduate students, visiting scholars and students, research faculty, instructors, and administrative professionals from across all five institutions in Woods Hole.

Methods & Tools for Evidence Collection
User Surveys, Informal Conversations, Resource & Use Statistics

新生儿 User Surveys
- User surveys will be distributed after each monthly webinar in order to continuously gather user feedback regarding user knowledge and comfort level with the library’s programs and services. The user survey will be distributed to webinar participants at the end of each webinar. The survey will be brief but will include a question in relation to the user’s knowledge of library services and programs. All user surveys will be distributed virtually via email to webinar participants.

新生儿 Informal Conversations
- The library currently receives information about user success due to library resources from the informal conversations had with users. These conversations will be an important factor in determining if the users are knowledgeable of the library’s programs and services as a result of participating in the webinar series. Informal conversations with colleagues, other scholars, and institution employees will also shed light on the level of comfort webinar participants have with the library’s programs and services. Information collected via informal conversations will be inputted into a spreadsheet created by the library to capture verbal user feedback.
Resource & Use Statistics

- The library’s resource and usage statistics will be evaluated to identify any increases in the frequency of library and resource use by the scientific community. It is expected that the webinar will attract more users to the library because the users will have more knowledge of all of the resources offered by the library. It is also expected that users will increase their engagement with the library’s resources and programs, so evaluating these statistics will also be a vital component of the assessment.

Suggestions for Pilot Assessment

Before the assessment is distributed to the webinar users after the inaugural webinar, it is important that the assessment methods above are piloted to ensure that the questions drafted for the survey are clear and will provide the library with the information they desire. Distributing the drafted survey questions to a small focus group of individuals will be an easy way to receive feedback on the clarity and content of the questions.

Alternative Methods & Tools

- **Focus Group**
  - Useful method in assessing participant knowledge and comfort level with the library’s services and programs
  - The librarian will be able to analyze additional detailed information on what users know, what services and programs users don’t know much about, and services that users still do not know the library offers
  - The added context could fill any gaps seen with the user survey

- **User interviews**
  - To obtain detailed information on how much users know about the library’s programs and services
  - Could be conducted in much of the same way as the focus group, including the same use of questions

Analysis of Evidence

The library Co-Directors and/or designated library staff members will take the collected data from the user surveys, the informal conversations, and the resource and use statistics, and will separate the qualitative and quantitative information before inputting the information into an excel spreadsheet. If Google Forms, or similar software, was used for the user surveys, graphs can be generated to reflect those results; however, it would be most beneficial to compile all data from all three sources into one spreadsheet in order to accurately display all feedback collected from users. Transferring the numbers into easy to understand visualizations will be key for reporting the data to both the library staff and its users.

How Assessors Will Know the Outcome Has Been Met

The outcome will be met when at least 60% of the webinar participants report being well-acquainted with the library’s services and programs.
Result Scenarios & Decision-Making Indicators

**Successful**

- **Result:** 60%-100% of webinar participants report being well-acquainted with the library’s services and programs
- **Decision:** The webinar series is successfully sharing all of the library’s services and programs with the webinar participants and is encouraging participants to understand what the library can offer them within their scientific careers.

**Moderately Successful**

- **Result:** 40%-59% of webinar participants report being well-acquainted with the library’s services and programs
- **Decision:** The webinar series is sharing some information about the library’s services and programs with webinar participants. A reevaluation of how the library is sharing their resources with the webinar participants would be beneficial in order to ensure that the webinar participants are able to learn about all resources that could benefit their careers.

**Unsuccessful**

- **Result:** 0-39% of webinar participants report being well-acquainted with the library’s services and programs
- **Decision:** If a low percentage of participants report being well-acquainted with the library’s services and programs, the webinar is not successfully sharing all of the resources they provide for their users. The data collected from the user needs survey and the informal conversations will need to be reviewed and analyzed to determine what areas users want and need to learn more about.

**Suggestions for Reporting**

After the analysis of the data collected by the user surveys, the informal conversations, and the resource and use statistics, the data will need to be complied and reported to library staff.

- **Important themes and compelling quotes** from the short answer questions within the user surveys and within informal conversations need to be collected and placed in an excel worksheet, or within a Word document.
- Use a **bar graph or a line graph** to show the percentages of participants who are and are not well-acquainted with the library’s services and programs.
- The bar or line graph and the summary of themes and quotes can be emailed out to library staff for review and discussion but will also need to be included in the library’s year-end report.
- When the chart and summaries are included in the year-end report, it will be important to ensure that all data collected at the end of each webinar is reflected.
Responsible Parties

The library Co-Directors along with a couple of designated library staff members, such as the Data Librarian and the Resource Sharing Librarian, will be the ones responsible for compiling the data, inputting it into a spreadsheet, and producing a chart of the results. The Co-Directors will disseminate the information to their staff and any user groups as required.

Timeline

Three Months Prior to First Webinar (May 2019)
- Draft questions for the user survey that will be emailed to all webinar participants 24 hours after the webinar
- Ensure there are many types of questions drafted for the survey including multiple choice, short answer, and ‘other’ options
- Organize who will be involved in the pilot testing for the survey (library staff, students, administrative assistants, etc.)

Two Months Prior to the First Webinar (June 2019)
- Distribute the user survey to the pilot group for completion and feedback
- Require all responses to the survey be submitted back to the library with a week
- Once feedback from the pilot group has been received, compile and organize their feedback into an excel worksheet

One Month Prior to the First Webinar (July 2019)
- Discuss the feedback received from the pilot testing between library Co-Directors and the designated library staff who are responsible for creating the user surveys
- Make any edits required and finalize the survey template for distribution to webinar participants

24 Hours after the First Webinar Takes Place (August 2019)
- Distribute the user survey to all webinar participants via email

One Week After the First Webinar (August 2019)
- Review and compile the results from the user survey
- Review any feedback that was received via informal conversations
- Retrieve library resource and usage data from the last month
- Input all data received into an excel worksheet
- Create charts and visualizations of the data

Two Weeks After the First Webinar (September 2019)
- Disseminate visualizations of the data to library employees
- Discuss results with library employees as required
- Reevaluate the structure of the program when comparing it to the survey results and make any changes necessary prior to the next month’s webinar

The same survey process will be completed 24 hours after each monthly webinar.
**Outcome 3:** The users will be able to identify the potential library services that could improve their research and data management.

**Target Audience**

The target audiences of this outcome are the practicing scientists, graduate students, visiting scholars and students, research faculty, instructors, and administrative professionals from across all five institutions in Woods Hole.

**Methods & Tools for Evidence Collection**

*User Surveys, Focus Groups, Library Usage Statistics*

𬯎 **User Surveys**

- User surveys will be distributed after each monthly webinar in order to continuously gather user feedback regarding the library services and programs that webinar users report as being the most relevant to their research and data management efforts. The user survey will be distributed to webinar participants at the end of each webinar. The survey will be brief but will include a question that will require users to identify the services and programs that they feel could help them improve their research and data management. All user surveys will be distributed virtually via email to webinar participants.

传奇游戏 **Focus Groups**

- Focus groups will consist of participants who are willing to share additional feedback with the library regarding the webinar series and the library as a whole. The focus group questions will be similar to the ones created for the user survey; however, they will be added to in order to prepare for various types of answers. The focus group will consist of between 5 and 10 webinar participants. One of the library’s Co-Directors act as the moderator. The focus group should provide the library with more robust information on the responses gleaned from the user survey. The additional context can be used to strengthen the webinar series and can ensure that the topics remain relevant to the users.

传奇游戏 **Library Usage Statistics**

- The library’s usage statistics will be evaluated to identify any increases in use of library services and programs by the scientific community. It is expected that the library will attract more users to the library through the dissemination of information regarding services and programming within the webinar series.

**Suggestions for Pilot Assessment**

Before the assessment is distributed to the webinar users after the inaugural webinar, it is important that the assessment methods above are piloted to ensure that the questions drafted for the survey and the focus group are clear and will provide the library with the information they desire. Distributing the drafted survey and focus group questions to a small focus group of individuals will be an easy way to receive feedback on the clarity and content of the questions. The pilot focus group will be comprised of several students, library staff, and other institution employees.
Alternative Method & Tools

- **Informal Conversation**
  - Used to assess how users identify services and programs that are useful for their personal research and data management need
  - Can be collected in the library’s spreadsheet to ensure it can be used during the data analysis portion of the assessment

- **Resource Statistics**
  - To determine if any of the library’s resources are receiving additional use based on the additional information being shared within the webinar series

Analysis of Evidence

The library Co-Directors and/or designated library staff members will take the collected data from the user surveys, focus groups, and use statistics, and will separate the qualitative and quantitative information before inputting the information into an excel spreadsheet. If Google Forms, or similar software, was used for the user surveys, graphs can be generated to reflect those results; however, it would be most beneficial to compile all data from all three sources into one spreadsheet in order to accurately display all feedback collected from users. Transferring the numbers into easy to understand visualizations will be key for reporting the data to both the library staff and its users.

How Assessors Will Know the Outcome Has Been Met

The outcome will be met when at least 60% of webinar participants report that they are able to identify the potential library services that could improve their research and data management.

Result Scenarios & Decision-Making Indicators

**Successful**

- **Result:** 60%-100% of webinar participants can identify the library services that can improve their research and data management
- **Decision:** The webinar series is successfully showing webinar participants the numerous ways in which the library can impact their research and data management.

**Moderately Successful**

- **Result:** 40%-59% of webinar participants can identify the library services that can improve their research and data management
- **Decision:** The webinar series is successfully sharing some information with webinar participants on how the library’s programs and resources can impact their research and data management. A reevaluation of how the library is sharing their resources with the webinar participants would be beneficial in order to ensure that the webinar participants are able to learn about all resources that could benefit their careers.
Unsuccessful

- **Result:** 0-39% of webinar participants can identify the library services that can improve their research and data management
- **Decision:** If only a low percentage of participants can identify the potential library services that can improve their research and data management, then webinar is not successfully sharing all of the resources they can provide to their users. The data collected from the user needs survey and the focus groups will need to be reviewed and analyzed to determine what resources users want and need to learn more about.

Suggestions for Reporting

After the analysis of the data collected by the user surveys, the focus groups, and the use statistics, the data will need to be complied and reported to library staff.

- **Important themes and compelling quotes** from the short answer questions within the user surveys and within the focus group conversations need to be collected and placed in an excel worksheet, or within a Word document.
- **Use a bar graph** to show the types of library services offered by the library and the frequency they were identified as useful to the participant’s research and data management practices.
- The bar graph and the summary of themes and quotes can be emailed out to library staff for review and discussion but will also need to be included in the library’s year-end report.
- When the chart and summaries are included in the year-end report, it will be important to ensure that all data collected at the end of each webinar is reflected.

Responsible Parties

The library Co-Directors along with a couple of designated library staff members, such as the Data Librarian and the Resource Sharing Librarian, will be the ones responsible for compiling the data, inputting it into a spreadsheet, and producing a chart of the results. The Co-Directors will disseminate the information to their staff and any user groups as required.

Timeline

**Three Months Prior to First Webinar (May 2019)**

- Draft questions for the user survey that will be emailed to all webinar participants 24 hours after the webinar
- Ensure there are many types of questions drafted for the survey including multiple choice, short answer, and ‘other’ options
- Use those same questions to create the list of questions used for the focus groups
- Make sure that the questions used for the focus group are worded in a way that encourages participants to provide more details and context in their answers
- Organize who will be involved in the pilot testing for the survey and focus group (library staff, students, administrative assistants, etc.)
Two Months Prior to the First Webinar (June 2019)
- Distribute the user survey to the pilot group for completion and feedback
- Distribute a list of focus group questions to the pilot group for review and feedback
- Require all responses to the survey be submitted back to the library with a week
- Once feedback from the pilot group has been received, compile and organize their feedback into an excel worksheet

One Month Prior to the First Webinar (July 2019)
- Discuss the feedback received from the pilot testing between library Co-Directors and the designated library staff who are responsible for creating the user surveys
- Make any edits required and finalize the survey template for distribution to webinar participants
- Host a mock focus group with a couple of library employees to allow the co-director to practice her moderating techniques while ensuring that the questions are clear and will provide ample information to the library

24 Hours after the First Webinar Takes Place (August 2019)
- Distribute the user survey to all webinar participants via email

One Week After the First Webinar (August 2019)
- Host a focus group with 5-10 webinar participants who are willing to share additional thoughts on how the webinar is benefiting their individual research and data management need
- Review and compile the results from the user survey and the focus group
- Retrieve library resource and usage data from the last month
- Input all data received into an excel worksheet
- Create charts and visualizations of the data

Two Weeks After the First Webinar (September 2019)
- Disseminate visualizations of the data to library employees
- Discuss results with library employees as required
- Reevaluate the structure of the program when comparing it to the survey results and make any changes necessary prior to the next month’s webinar

The same survey process will be completed 24 hours after each monthly webinar.

Outcome 4: The users will demonstrate data best practice procedures based on the information they learn through the monthly webinar.

Target Audience

The target audiences of this outcome are the practicing scientists, graduate students, visiting scholars and students, research faculty, instructors, and administrative professionals from across all five institutions in Woods Hole.
Methods & Tools for Evidence Collection

User Surveys & Data Management Service Statistics

 DispatchQueue

User Surveys
- User surveys will be distributed after each monthly webinar in order to continuously gather user feedback to assess whether library users are learning and applying data best practices to their personal research endeavors. The user survey will be distributed to webinar participants at the end of each webinar. The survey will be brief but will include a question that will require users to identify what they have learned about data management and how they are using that new knowledge within their own research practices. All user surveys will be distributed virtually via email to webinar participants.

 DispatchQueue

Data Management Service Statistics
- Statistics from the library’s data management services will be analyzed to evaluate whether data service usage and data assistance inquiries have increased after monthly webinars that deliver information on the data services provided by the library. Webinars that focus on the data repository, the data management tools, and other data related programs are expected attract additional users to the library, or at least bring more attention and use to the services that are currently being provided within the library.

Suggestions for Pilot Assessment

Before the assessment is distributed to the webinar participants after the inaugural webinar, it is important that the assessment methods above are piloted to ensure that the questions drafted for the survey are clear and will provide the library with the information they desire. Distributing the drafted survey and focus group questions to a small focus group of individuals will be an easy way to receive feedback on the clarity and content of the questions.

Alternative Methods & Tools

- **Focus Groups**
  - To assess how users are learning about and using the data management services as a result of learning about them through the monthly webinars
  - Beneficial to include both users who have begun using the data management services as a result of the webinar as well as users who do not use the data management services
    - Analyze to determine relevant needs of both user types

- **Informal Conversations**
  - To assess how users are learning about and using the data management services as a result of the information learned through the webinar series
  - The data retrieved from informal conversations can be collected in the library’s spreadsheet to ensure it can be used during the data analysis portion of the assessment.
Analysis of Evidence

The library Co-Directors and/or designated library staff members will take the collected data from the user surveys and data management service usage statistics and will separate the qualitative and quantitative information before inputting the information into an excel spreadsheet. If Google Forms, or similar software, was used for the user surveys, graphs can be generated to reflect those results; however, it would be most beneficial to compile all data from both sources into one spreadsheet in order to accurately display all feedback collected from users. Transferring the numbers into easy to understand visualizations will be key for reporting the data to both the library staff and its users.

How Assessors Will Know the Outcome Has Been Met

The outcome will be met when at least 60% of webinar participants report that are applying data best practices to their research as a result of attending the monthly webinars that focus on topics surrounding data management.

Result Scenarios & Decision-Making Indicators

Successful

- **Result**: 60%-100% of webinar participants report that they are applying data best practices to their research as a result of attending the monthly webinars that focus on topics surrounding data management
- **Decision**: The webinar series is successfully teaching webinar participants about how to apply data best practices to their own research. The webinar series is also successfully sharing information about their data management services to participants of the webinar series.

Moderately Successful

- **Result**: 40%-59% of webinar participants report that they are applying data best practices to their research as a result of attending the monthly webinars that focus on topics surrounding data management
- **Decision**: The webinar series is successfully teaching some webinar participants about how they can apply data best practices to their own research. A reevaluation of how the library is both teaching webinar participants and sharing data best practice resources within the webinar series should be analyzed in order to ensure that the webinar participants are able to learn about all practices and resources that could benefit their careers.

Unsuccessful

- **Result**: 0-39% of webinar participants report that they are applying data best practices to their research as a result of attending the monthly webinars that focus on topics surrounding data management
- **Decision**: If only a low percentage of participants report that they are learning about and applying data best practices to their research as a result of attending the webinars...
that focus on topics of data management, then the webinars are not successfully teaching data best practices and sharing all of the data resources they can provide to their users. The data collected from the user needs survey and the data management service usage will need to be reviewed and analyzed to determine what resources users want and need to learn more about.

**Suggestions for Reporting**

After the analysis of the data collected by the user surveys and the data service usage statistics, the data will need to be complied and reported to library staff.

- Qualitative data (short answers from the user surveys) can be shared by selecting **important themes and compelling statements** and posting them within an excel chart or within a Word document.
- Use **bar graph, pie chart, or line graph** to present the quantitative data from the user surveys and the statistics from data management services.
  - The data management usage statistics would be best shown within a **pie chart**.
  - Multiple choice or list questions within the user survey would be best shown as a **bar graph** to show the importance certain topics have with the participants of the webinars.
- Reporting this data will allow library staff to determine which services and topics are more relevant to their users and which services that could potentially be reworked.
- All collected data that has been processed into charts and lists will need to be emailed out to library staff for review and discussion.
  - Also need to be included in the library’s year-end report
- When the quotes and charts are included in the year-end report, it will be important to ensure that all data collected at the end of each webinar is reflected.

**Responsible Parties**

The library Co-Directors along with a couple of designated library staff members, such as the Data Librarian and the Resource Sharing Librarian, will be the ones responsible for compiling the data, inputting it into a spreadsheet, and producing a chart of the results. The Co-Directors will disseminate the information to their staff and any user groups as required.

**Timeline**

**Three Months Prior to First Webinar (May 2019)**
- Draft questions for the user survey that will be emailed to all webinar participants 24 hours after the webinar
- Ensure there are many types of questions drafted for the survey including multiple choice, short answer, and ‘other’ options
- Organize who will be involved in the pilot testing for the survey (library staff, students, administrative assistants, etc.)

**Two Months Prior to the First Webinar (June 2019)**
- Distribute the user survey to the pilot group for completion and feedback
- Require all responses to the survey be submitted back to the library with a week
Once feedback from the pilot group has been received, compile and organize their feedback into an excel worksheet.

### One Month Prior to the First Webinar (July 2019)
- Discuss the feedback received from the pilot testing between library Co-Directors and the designated library staff who are responsible for creating the user surveys.
- Make any edits required and finalize the survey template for distribution to webinar participants.

### 24 Hours after the First Webinar Takes Place (August 2019)
- Distribute the user survey to all webinar participants via email.

### One Week After the First Webinar (August 2019)
- Review and compile the results from the user survey.
- Retrieve data management service data from the last month.
- Input all data received into an excel worksheet.
- Create charts and visualizations of the data.

### Two Weeks After the First Webinar (September 2019)
- Disseminate visualizations and charts of the data to library employees.
- Discuss results with library employees as required.
- Reevaluate the structure of the program when comparing it to the survey results and make any changes necessary prior to the next month’s webinar.

*The same survey process will be completed 24 hours after each monthly webinar.*

**Outcome 5:** The users will be able to make informed decisions on when to use the Institutional Repository service for their research.

**Target Audience**

The target audiences of this outcome are the practicing scientists, graduate students, visiting scholars and students, research faculty, instructors, and administrative professionals from across all five institutions in Woods Hole.

**Methods & Tools for Evidence Collection**

*User Surveys & WHOAS Repository Statistics*

 ⇒ **User Surveys**

  o User surveys will be distributed after each monthly webinar in order to continuously gather user feedback to assess whether library users are able to determine when to use the Institutional Repository service for their research. The user survey will be distributed to webinar participants at the end of each webinar. The survey will be brief but will include a question that will require users to identify how they determine if their research would benefit from submission to the open access/Institutional Repository. All user surveys will be distributed virtually via email to webinar participants.
WHOAS Repository Statistics
- Statistics from the library’s Open Access and Data Repository (WHOAS) will be analyzed to evaluate whether an increase in submissions to the repository can be seen as a result of the monthly webinars that deliver information on the repository service. Webinars that focus on the repository are expected to encourage new and/or increased participant use in the repository service.

Suggestions for Pilot Assessment

Before the assessment is distributed to the webinar participants after the inaugural webinar, it is important that the assessment methods above are piloted to ensure that the questions drafted for the survey and the focus group are clear and will provide the library with the information they desire. Distributing the drafted survey questions to a small focus group of individuals will be an easy way to receive feedback on the clarity and content of the questions.

Alternative Methods & Tools

- Focus Groups
  - Used to assess how users are determining if their data and/or final research products should be included in the Open Access/Data Repository (WHOAS) based on what they have learned through the monthly webinars
  - Beneficial to include both users who have begun using the repository as a result of the webinar, as well as users who do not use the repository
    - Analyze not only how the webinar is informing and assisting users, but also to determine what other topics could be discussed that would meet relevant needs for both types of users

- Informal Conversations
  - Used to assess how users are learning about and using the repository as a result of the information learned through the webinar series
  - The data retrieved from informal conversations can be collected in the library’s spreadsheet to ensure it can be used during the data analysis portion of the assessment.

Analysis of Evidence

The library Co-Directors and/or designated library staff members will take the collected data from the user surveys and repository statistics and will separate the qualitative and quantitative information before inputting the information into an excel spreadsheet. If Google Forms, or similar software, was used for the user surveys, graphs can be generated to reflect those results; however, it would be most beneficial to compile all data from both sources into one spreadsheet in order to accurately display all feedback collected from users. Transferring the numbers into easy to understand visualizations will be key for reporting the data both library staff and users.

How Assessors Will Know the Outcome Has Been Met

The outcome will be met when at least 60% of webinar participants report that they are able to determine whether their data and/or their final research products should be submitted to the Open
Access and Data Repository (WHOAS) as a result of attending the monthly webinars that focus on topics surrounding data management.

**Result Scenarios & Decision-Making Indicators**

**Successful**

- **Result:** 60%-100% of webinar participants report that they are able to determine whether their data and/or final research products should be submitted to the Open Access/Data Repository (WHOAS) as a result of attending the monthly webinar.
- **Decision:** The webinar series is successfully teaching webinar participants about how to determine when both data and research final products should be submitted to the repository.

**Moderately Successful**

- **Result:** 40%-59% of webinar participants report that they are able to determine whether their data and/or final research products should be submitted to the Open Access/Data Repository (WHOAS) as a result of attending the monthly webinars.
- **Decision:** The webinar series is successfully teaching some webinar participants how to determine when both data and research final products should be submitted to the repository. A reevaluation of how the library is teaching webinar participants about the repository within the webinar series should be analyzed in order to ensure that the webinar participants are able to learn how the repository can impact their personal research careers.

**Unsuccessful**

- **Result:** 0-39% of webinar participants report that they are able to determine whether their data and/or final research products should be submitted to the Open Access/Data Repository (WHOAS) as a result of attending the monthly webinars.
- **Decision:** If only a low percentage of participants report that they are able to determine whether their data and/or final research products should be submitted to the Open Access/Data Repository (WHOAS) as a result of attending the monthly webinars, then the webinars are not successfully teaching participants about the repository. The data collected from the user needs survey and the repository statistics will need to be reviewed and analyzed to determine what additional information needs to be shared and/or reviewed with participants.

**Suggestions for Reporting**

After the analysis of the data collected by the user surveys and the repository statistics, the data will need to be compiled and reported to library staff.

- Qualitative data (short answers from the user surveys) can be shared by selecting important themes and compelling statements and posting them within an excel chart or within a Word document.
Quantitative data from the user surveys and the repository statistics will need to be compiled and shown by creating a **bar graph**, **pie chart**, or **line graph**.

The repository usage statistics would be best shown within a **pie chart**.

Multiple choice or list questions within the user survey would be best shown as a **bar graph** to show the importance certain topics have with the participants of the webinars.

- Will allow library staff to determine which services and topics are more relevant to their users and which services that could potentially be reworked

All collected data that has been processed into charts and lists will need to be emailed out to library staff for review and discussion

- Also need to be included in the library’s year-end report

When the quotes and charts are included in the year-end report, it will be important to ensure that all data collected at the end of each webinar is reflected.

**Responsible Parties**

The library Co-Directors along with a couple of designated library staff members, such as the Data Librarian and the Resource Sharing Librarian, will be the ones responsible for compiling the data, inputting it into a spreadsheet, and producing a chart of the results. The Co-Directors will disseminate the information to their staff and any user groups as required.

**Timeline**

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- Input all data received into an excel worksheet
- Create charts and visualizations of the data

**Two Weeks After the First Webinar (September 2019)**
- Disseminate visualizations and charts of the data to library employees
- Discuss results with library employees as required
- Reevaluate the structure of the program when comparing it to the survey results and make any changes necessary prior to the next month’s webinar

*The same survey process will be completed 24 hours after each monthly webinar.*
## Impact Rubric

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>Below Expectations</th>
<th>At Expectations</th>
<th>Beyond Expectations</th>
<th>Data Source</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Webinar Attendance</strong></td>
<td>Less than 15 participants attend the webinar</td>
<td>15-25 participants attend the webinar(^1)</td>
<td>25 or more participants attend the webinar</td>
<td>User Surveys and Webinar Attendance Statistics</td>
</tr>
<tr>
<td></td>
<td>Less than 2 Institutions represented</td>
<td>2-3 institutions are represented</td>
<td>4-5 institutions are represented</td>
<td></td>
</tr>
<tr>
<td><strong>User Satisfaction</strong></td>
<td>Fewer than 60% of participants report that the webinar series is relevant to their research</td>
<td>60%-75% of participants report that the webinar series is relevant to their research</td>
<td>More than 75% of participants report that the webinar series is relevant to their research</td>
<td>User Surveys, Focus Groups, Informal Conversations, Webinar Attendance Statistics</td>
</tr>
<tr>
<td><strong>Webinar Growth</strong></td>
<td>Average webinar attendance remains stable or declines within a 3-month period</td>
<td>Average webinar attendance increases by 10%-20% within a 3-month period</td>
<td>Average webinar attendance increases by 30% or more within a 3-month period</td>
<td>Webinar Attendance Statistics</td>
</tr>
<tr>
<td><strong>Awareness of Services &amp; Resources</strong></td>
<td>65% or fewer of the webinar participants report an increase in knowledge in regard to the library’s services and resources</td>
<td>65%-80% of webinar participants report an increase in knowledge in regard to the library’s services and resources</td>
<td>80%-100% of webinar participants report an increase in knowledge in regard to the library’s services and resources</td>
<td>User Surveys, Focus Groups, Informal Conversations</td>
</tr>
</tbody>
</table>

\(^1\)The expected attendance for the webinar series was based on the number of people in the library’s user community (approx. 3,000). The ‘At Expectations’ estimate is based on an attendance of 0.5-0.8% of the total user community.
Appendices

Appendix A: MBLWHOI Library Strategic Plan Jan/Feb. 2018

Summary of Library Strategic Planning Meeting
January/February 2018

Vision: The MBLWHOI Library is dedicated to advancing scholarship and education in the Woods Hole Scientific Community through Library services, innovative research, collaborations and informatics tools.

Mission: The MBLWHOI Library is internationally recognized as defining current trends and practices in marine information sciences and science informatics. The Library is operated jointly by the Marine Biological Laboratory (MBL) and the Woods Hole Oceanographic Institution (WHOI) and provides information resource services to four affiliate organizations, the United States Geological Survey (USGS) Woods Hole Coastal and Marine Science Center, the Sea Education Association (SEA), and the Woods Hole Research Center (WHRC), and NOAA, Northeast Fisheries Science Center Woods Hole. The Library works collaboratively with partners around the world to provide access to scientific information for the creation of new knowledge through collections, resource sharing, preservation, and the development and implementation of new technologies.

Primary Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Primary</th>
<th>Backup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisition of serials, monographs and databases including licensing</td>
<td>Matt(s), Ann (m), Jen(d)</td>
<td>Matt(d), Jen(s) Lisa(l), Audrey(l)</td>
</tr>
<tr>
<td>Archives, ArchivesSpace</td>
<td>Dave-WHOI Jen-MBL</td>
<td>Audrey - software Matt-MBL</td>
</tr>
<tr>
<td>Best Practice Vocabularies, ontologies: development and training, metadata standards</td>
<td>All Staff</td>
<td></td>
</tr>
<tr>
<td>Cataloging and Authority Control</td>
<td>Nancy, Kirill, Matt</td>
<td>Matt, Nancy, Kirill</td>
</tr>
<tr>
<td>Circulation, CallSlip</td>
<td>Nancy, Ann</td>
<td>All Staff</td>
</tr>
<tr>
<td>Collection documentation: cataloging, metadata, procedures</td>
<td>Nancy, Matt</td>
<td>Matt, Nancy</td>
</tr>
<tr>
<td>Collection Space, maintenance, and evaluation</td>
<td>MBL Jen, Matt WHOI all</td>
<td>MBL Matt, Jen WHOI all</td>
</tr>
<tr>
<td>Cooperative Library Projects: BHL,BLC, BCO-DMO,HPS,IODE,DPLA,EAST</td>
<td>All Staff</td>
<td></td>
</tr>
<tr>
<td>Copyright Education and information</td>
<td>Ann</td>
<td>Lisa, Jen</td>
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<tr>
<td>Course reserves</td>
<td>Jen, Ann</td>
<td>Ann, Jen, Nancy</td>
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<tr>
<td>Data Services including ingest, curation, DMP, initiatives</td>
<td>Audrey, Lisa, Jen</td>
<td>Dave</td>
</tr>
<tr>
<td>Activity</td>
<td>Responsible Parties</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------------------------------</td>
<td></td>
</tr>
<tr>
<td>External committee work</td>
<td>All Staff</td>
<td></td>
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<tr>
<td>ILL and Document Delivery</td>
<td>Nancy, Ann, Kirill</td>
<td></td>
</tr>
<tr>
<td>Institutional Research Services: metrics, promotional, assisting</td>
<td>John, Ann, Audrey, Kirill</td>
<td></td>
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<tr>
<td>administrative units with biblio-information, Symplectic Elements</td>
<td></td>
<td></td>
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<tr>
<td>Library space applications, memberships, access</td>
<td>Jen</td>
<td></td>
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<tr>
<td>Outreach</td>
<td>All Staff</td>
<td></td>
</tr>
<tr>
<td>Presenting at conference, keeping current</td>
<td>All Staff</td>
<td></td>
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<tr>
<td>Public IT, computers and copiers</td>
<td>Copiers-Jen, IT-John, Systems - Kirill</td>
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<td>Records Management</td>
<td>Jen, Dave</td>
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<tr>
<td>Reference Services</td>
<td>All Staff</td>
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<tr>
<td>Remote access</td>
<td>John</td>
<td></td>
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<tr>
<td>Tours, instruction</td>
<td>Ann, Jen, Dave</td>
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<td>Social Media</td>
<td>Matt</td>
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<tr>
<td>WHOAS/ Open Access</td>
<td>Ann</td>
<td></td>
</tr>
<tr>
<td>Library Website</td>
<td>Audrey</td>
<td></td>
</tr>
</tbody>
</table>

**Short-Term Goals (6-18 months)**

**Library Data and Visualization:**
Matt
Matt will be the point person for developing knowledge about data visualization, focusing on public consumption. We will continue to integrate visualization into our annual reports and will look into using them in email and web communications going forward.

**Discovery:**
Kirill
Kirill will be the lead on resource discovery as a whole, testing out and reporting back as needed on various discovery overlay products and developments.

**Integrated Library System (ILS):**
Kirill, Ann, Nancy, Audrey
Kirill will lead a group to produce a brief summary of the current ILS software options by the end of May. With this information, we should be able to decide whether to pursue a broader software evaluation in the next year. We will solicit guidance from all the staff to make sure we get enough information to make this decision.

**Linked Data:**
Audrey, Nancy
Audrey and Nancy will meet to talk about linked open data for authority records. We will have an interest group meeting to review some of the work being done in the library field using semantic technology by sharing article summaries. We will pursue leads that come out of these discussions, including educational sessions, test servers, and collaborations.

**Video Tutorials:**
Nancy
Nancy has created a proof of concept video for instruction on ILL. She will consider other areas of need and create new videos as desirable. She will also serve as a resource for others looking to create videos for library users.

**Bibliographies:**
John, Ann, Dave, Audrey
This group will continue to research new solutions for NOSAMS and Deep Submergence-type subject/project bibliographies. It will also make sure that the WHOI Contributions database is archived and accessible in ArchivesSpace.

**Joint Staff Activities:**
Incorporate sharing of projects and positive feedback from users into joint staff meeting. Arrange for field trips to other departments as a separate activity than joint staff meetings
Sharing about library work: All
Field trips to better understand science – Dave, Kirill**

**Library Marketing Initiative**

**Audience:**
- Administrative Assistants
- Scientists
- Scientific Staff
- Students

**Motivation:**
- Gain more users
- Better informed users
- Name recognition
- Showing value for money

**Tagline:**
Create a tagline for the Library. Best practices and examples from other libraries should be investigated. Present to Joint Staff April 2018.
Matt**, Audrey, Lisa, Nancy

**Onboarding:**
Library brochure in welcome packet? Cost, updates, logistics
Email to new users. Identify groups to get letter. Basic template May 2018.
Ann**, John, Kirill

**Print Flyers:**
Create flyers and decide on bulletin boards. Locations and 1st flyers End of March 2018.
Audrey**, Matt, Kirill, Dave

**Interest Groups- Open Access trial:**
Regular meeting group to explore Open Access Ideas
Audrey**, Ann, Matt

**User Stories – Administrative Assistant Forum Trial:**
Present to WHOI Admins focusing on a user who has incorporated Elements to save time.
Include post event evaluation.
Lisa**, John

**Library Trends to investigate:**
Usage is shifting away from some paid Library resources and new services developing—This is a wider trend in libraries that requires libraries to rethink users and usability, changes in skills and efforts and the potential for new projects. How much can we get online for free from other sources? Investigate tools to find OA material.

**Knowledge** – Libraries are moving beyond supplying information to become knowledge centers on campus. For instance, don’t just provide publication lists, provide other context, links analysis, etc.

**Use of materials that are not digital** – ILL and our users still need materials that are only available in print. Distributed print repositories are helping libraries meet user needs for older print materials.

**Flexible, collaborative spaces in libraries**

**Collaborations** – consider new collaborations, especially with existing partners and affiliates
Appendix B: MBL WHOI Library Report 2017
MBLWHOI Library Report
January 1, 2017 – December 31, 2017
From the Co-Directors:

In 2017 the Marine Biological Laboratory (MBL) and the Woods Hole Oceanographic Institution (WHOI) renewed their Memorandum of Understanding (MOU) for the shared science library. The MBL Library was founded in 1888 and since the WHOI founding in 1930, the institutions have collaborated at various levels over many years to provide library services. For the last several decades we have operated as an integrated joint library staff. The MBLWHOI Library also provides library services to the USGS Woods Hole Coastal and Marine Science Center, the Sea Education Association, the Woods Hole Research Center, and the NOAA Northeast Fisheries Science Center. Considering MBL’s affiliation with the University of Chicago, there had been a period of uncertainty as to the future path of the relationship. The signing of the MOU in 2017 confirmed the joint commitment of the institutions, and enables the Library to move forward with reinvigorated energy.

These are exciting and challenging times for academic libraries. The Library continues to find innovative ways to serve the needs of the institutions, given the constraints of the funding climate and the ever-increasing costs of traditional scientific publishing. Projects such as Vivo, GeoLink and BHL widen the scope and service of the library.

The staff consistently delivers the highest levels of customer service in support of scientific research in Woods Hole.

· Lisa Raymond and Jen Walton
• **Library Staff**

Lisa Raymond, Co-Director MBLWHOI Library, Director of Library Services at WHOI

Jennifer Walton, Co-Director MBLWHOI Library, Director of Library Services at MBL

Kirill Batyuk, Systems/Metadata Librarian

Ann Devenish, Publication Services

John Furfey, Senior Automation Services Officer

Audrey Mickle, Data Librarian

Matthew Person, Tech Services Coordinator

Dave Sherman, WHOI Archivist

Nancy Stafford, Resource Sharing/Cataloging Librarian

• **Library Volunteers at MBL Lillie and WHOI DLA**

Digital Herbarium Project (at MBL and WHOI): Gale Clark, Joe deVeer, Tom Gregg, Carol Knox, Lucy Lester, Madison Meister, Pam Polloni, Arlene Rogers, Jan Salick, Donald Schall, Judy Stetson, and Jacqueline Webster.

WHOI Data Library and Archives (DLA): Werner Deuser, Ralph Montilio, Wendell Edwards, Hartley Hoskins and Laura Catanach.
Library Activities and Services

Library activities and services center around the missions of the institutions served. Built upon a foundation of “Core” services, the Library has developed and continues to develop additional programs and projects to meet the growing needs of its users. These are listed below:

“Core” Services

- Acquisitions and management of collections, including monographs, serials and databases
- Citation management
- Course reserves
- Institutional archives
- Instructional programming and public outreach
- Interlibrary loan
- Reference services
- Records management
- Remote access to electronic resources
- Working space
• **Library Instruction and Outreach**

Library staff gave lectures, tours, orientations and provided on request library instruction to Woods Hole scientific community members throughout the year. This programming included general introductions to the physical and digital library, classes focusing on specific databases, one-on-one instruction, and informational sessions on accepted publishing and data management standards, and standards required by different grant distribution bodies.

The rare books collections continue to be used by students and researchers, including students from Sea Education Association (SEA), the MBL's Semester in Environmental Science (SES), and the Woods Hole Partnership in education program (PEP). Tours were conducted during MBL and WHOI summer courses / programs student orientations, seminars, courses, donor visits, and for other special MBL and WHOI guests.

Of note in July 2017 was the MBL Rare Books and Japan/MBL history tour given to the Consul General of Japan in New England, Rokuichiro Michii while he toured both MBL and WHOI.

(1r Sebastien Laye, Consul General of Japan Rokuichiro Michii, Matt Person, Jen Walton)
In 2017, our outreach activities mainly focused on the bibliometric projects using Elements and Vivo. John Furfey and members of the Library staff met with scientists, administrators and other staff at MBL and WHOI to promote and provide instruction on these services for the Woods Hole scientific community.

- **Memorandum of Understanding**

In 2017, MBL and WHOI signed a revised MBLWHOI Library MOU formalizing and renewing the bond between the institutions and ensuring that the Library will continue to serve all the institutions in Woods Hole.

(lr: Melina Hale, David Mark Welch, Mark Abbott, Jame Yoder, Jen Walton)
• **Data Activities**

The WHOI Co-Director is a member of the Research Data Alliance and actively involved in several working/steering groups for the International Oceanographic Data and Information Exchange (IODE) of the [Intergovernmental Oceanographic Commission (IOC)](https://www.ioc-unesco.org) of UNESCO. The Data Librarian is a member of ESIP. Work was completed on the NSF EarthCube funded project, Geolink.

Working with GeoLink partners, the Library created a script that queries our SPARQL endpoint for data and rewrites the RDF to conform to GeoLink patterns. The published RDF was provided to the GeoLink knowledge base. The triple store data for the project is deposited in WHOAS.

The Data Librarian created code for a widget (image below) that appears in WHOAS records when there is related cruise information in the GeoLink knowledge base.
Publications generated:


- Bibliometrics and Institutional Research Services: last year more tech, this year more outreach and partnerships.

The Library continued to refine the implementation and rollout of Symplectic Elements, a full featured research information management (RIM) system. RIM is an emerging service for academic libraries and this work positions MBLWHOI with new opportunities to support the strategic goals of the researchers and institutions in Woods Hole.

Numerous technical enhancements to our Elements platform were completed to add value to the research data we collect and curate. Our institutional repository (WHOAS) was configured as a data source for Elements. Research products deposited in WHOAS are now automatically pushed to Elements to become part of a researcher’s scholarly record. Responding to a request from research administrators, a new custom report was created to generated to supply data for the NSF Conflict of Interest form. Additionally, the Woods Hole VIVO (http://vivo.mblwhoilibrary.org) instance went live providing a public facing research profile for all scientists in Elements.

In addition to the technical improvements, Library staff made outreach efforts to the scientific community to increase awareness and interest in our RIM services. Elements was presented to numerous research and administrative departments at both MBL and WHOI, and the service was well received. The feedback from this outreach led to a number of new use cases which the Library will be working on in 2018. This includes:

- Tracking research activity associated with specific model organisms
- Using Elements to manage the usage and research output of facilities such as MBL Central Microscopy.
• Consortial Activities

The Library is a member of the 18 member Boston Library Consortium (BLC), which serves New England academic library institutions. In 2017 library Co-Director, Lisa Raymond, was President of the BLC Board of Directors. Library staff participated in a number of BLC Communities of Interest, including Resource Sharing, Continuing Resources and Metadata Management, Resource Management, and Special Collections. As a part of the BLC Leads Program, MBLWHOI hosted 2 program participants for a day visit. This gave a chance for aspiring leaders in BLC Libraries a chance to see how a small special library operates.

The Library is a member of the Eastern Academic Scholar’s Trust (EAST), a distributed print repository, as a serials retention partner. The Library also participates in the BioInformation Science Consortium, composed of biological and biomedical libraries in the Boston/New York area for resource sharing.

The WHOI and MBL Co-Directors are listed as invited experts in the IODE Steering Groups for OceanDocs, and OceanKnowledge.

Through long term work on the Biodiversity Heritage Library (BHL) Staff, and Collections Committees, the MBLWHOI Library continues to have a role in the day to day operation of this internationally recognized virtual science library. In 2017 the Library authored the BHL blog post: *A report from the MBLWHOI Library: BHL supports the research of recent Catherine N. Norton Fellows* (https://blog.biodiversitylibrary.org/2017/07/a-report-from-mblwhoi-library-bhl.html) The BHL project continues to inform Library space planning decisions and allow easier access to researchers interested in historical works.

• 2017 Interlibrary Loan Statistics

The demand for resource sharing continues to grow every year and is a highly valued service. It augments the library’s carefully selected collection and ensures that users have access to resources they need to be successful. Given the specialized nature of our collection, one might initially think worldwide interest in our materials would be low but the library is consistently a ‘net lender’.
That designation, built on quality, quick turnaround time, and trust means that when our patrons need something, other libraries respond to our users’ needs in the same manner. Therefore, lending is very important to borrowing.

The MBLWHOI Library complies with U.S. Copyright Law (Title 17, U.S. Code) and adheres to the principles of the ILL Code for the United States. Borrowing and lending articles is worldwide. Books are borrowed from and loaned to other libraries within the United States.

As a member of the Boston Library Consortium and involvement in its Resource Sharing Community of Interest, we all follow written Best Practice policies with the mission: to get materials into the hands of our user community as quickly and cost-effectively as possible. These practices are reviewed annually and take into consideration such things as technological improvements.

During 2017, our involvement with Eastern Academic Scholars’ Trust (EAST) adopted best practices for the lending and borrowing of books ‘non returnables’ which added non-BLC members to our partnership list.

<table>
<thead>
<tr>
<th>Lending 2017</th>
<th></th>
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</thead>
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Library Collections

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<td>Renewals</td>
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<td>Items Discharged</td>
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- Circulating Collection Accessions

MBL Book Stacks: 39  
Data Library and Archives*: – 93  
*includes monographs, tech reports and thesis
• Woods Hole Open Access Server (WHOAS): a Digital Institutional Repository

WHOAS continues its steady growth track, having added 728 new metadata records and their associated digital objects in the 12-month period ending December 2017. At the close of the period, metadata records totaled 8992, 1113 of which are from the International Association of Aquatic and Marine Science Libraries and Information Centers (IAMSLIC).
• **Serials and EAST Project**

**Subscribed titles 2017:**
- Electronic: 770
- Print: 16

**Freely accessible open access titles: in the thousands**

**Article views of subscribed to titles (2016): 168,133**

In light of the fact that libraries nationally have run out of space, the in-depth assessment and analysis of the serials stacks continued through the Library's work as a member of the Serials Working Group of the EAST Eastern Academic Scholars Trust. This project involved the collaboration of over 60 east coast academic and research libraries to develop a shared print retention partnership. The project mission is to ensure researchers in the Eastern region of the United States have access to print journals and serials through multi-library collaborative arrangements that ensure copies of even infrequently used materials are retained in sufficient number to be readily available. Matthew Person was the Library representative on this committee. The working group established standards and parameters for this project, and by the end of the year in Cohort 1 of this project 465 serials titles were allocated for retention by the MBLWHOI Library.

Also, by the end of 2017 about 680 linear feet of journals had been removed from the stacks. The analysis, assessment, retention, and weeding of the stacks project continues. The electronic serials collection of the Library, we recognize will also need to respond to the increasingly expensive serials publishing landscape over the next decade, and change dramatically, as it will be necessary for this Library to respond through Open Access services, while continuing to serve the needs of the scientists who continue to use the physical library collections.
• **WHOI Data and Archives**

Arrangement and description of two major collections, the Oral History and Historical Instruments collections was completed this year in the WHOI Archives. Both collections now have finding aids available in the library's archival management system, ArchivesSpace. Library volunteers also worked on creating an updated inventory of holdings in the Audiovisual collection and have added the updated records to ArchivesSpace. A project culling student and employee files based on records retention requirements was also completed in the archives in 2017; a total of 114 linear feet of space was made available as a result of the project. Three loans, including photographs, artifacts and items from the historical instrument collection, were made to outside organizations for museum exhibits. Six tours of the Data Library and Archives were also conducted for visiting groups and individuals.

Received 16 accessions totaling 38.5 lin. ft.

Processed 289.75 lin. ft. and 121Mb of electronic records as follows:

- **AC-01**: Trustees records - 64Mb
- **AC-03**: Communications - .25'
- **AC-09.10**: Director, Avery records - .25'
- **AC-09.11**: Director, Abbot records - 40Mb
- **AC-13**: Academic Programs Office records - 7.5'
- **AC-15**: IAMSLIC records - 2Mb
- **AC-45**: Oral history collection - 1Mb
- **AC-57**: Audiovisual collection - 280'
- **MC-01**: Allyn Vine papers - 14Mb
- **MC-77**: Rocky Miller papers - 1.25'
- **MC-88**: Arthur Maxwell papers - .5'
Five graduate students from the Center for Biology and Society of Arizona State University returned to MBL for the fifth and final summer of the MBL History Project in 2017. The students performed QA/QC to make sure that the repository metadata was correct and ensured that all the files had been properly uploaded. Additional video interviews were conducted and added to the History of the MBL website and the History Project dedicated Youtube page.

Development Work on the repository and website continued through the rest of the year, with efforts focused on making the information discoverable and useable. A social media education program, highlighting people and events related to MBL history was begun in 2017. Weekly posts are composed about the History Project and are posted on the Library Twitter and facebook feeds.
Supply Dept. staff @MBLScience in 1919 bit.ly/2I9C8eX and 1930 bit.ly/2C9PZLX. DISCOVER the unique history of the Supply Dept. online @MBLHistory Project exhibit: bit.ly/2pluPzs Written by @FossilHistory @ASU Phd student Paige Madison
• Catherine N. Norton Fellowship

Cathy Norton directed the MBLWHOI Library for nearly two decades as a true visionary in the area of information science both inside and outside of Woods Hole. This Fellowship created in her honor, encourages applicants to develop creative projects in Archives, Informatics, Collection Analysis, or Digital Collections while being mentored a MBL Lillie Library librarian. Projects should be openly accessible, collaborative, innovative, connective, and lay the foundation for the development of new scientific knowledge.

The 2017 Norton Fellowship was awarded to Sean Cohmer of Arizona State University to create an interpretive exhibit exploring some of the organisms used by Thomas Hunt Morgan at MBL.
Appendix C: MBLWHOI Library Strategic Plan 2012

MBLWHOI Library Vision Statement Spring 2012

The MBLWHOI Library Senior Staff (Holly Miller, Library Director; Lisa Raymond, Associate Director; Diane Rielinger, Assistant Director; Jen Walton, Library Coordinator) met in January 2012 to begin the process of updating the Library’s strategic plan. A strategic planning retreat was held with the full Library staff in February 2012. A series of values were articulated that form the foundation of the Library. Vision and mission statements were developed in light of these values, and with consideration of the visions and missions of the MBL, WHOI, and the MBL Center for Library and Informatics. Current library services were listed, with goals developed for the services. Finally, the goals were ranked by the staff, with the highest-ranking items identified as short-term goals for purposes of this statement.

History and Overview

Important historical points

1. The founders of the MBL held the ideal to collect everything. MBL was too isolated from other institutions of higher learning. Today’s increasingly electronic and connected world has changed the landscape.
2. The Library has a long history of exchanges that were used to connect with other institutions. The Library now uses consortia such as International Association of Marine Science Libraries and Information Centers (IAMSLIC), Boston Library Consortium (BLC) and Biodiversity Heritage Library (BHL) to connect with other libraries.
3. Rare books are a joint library collection. They are used for intellectual value or provenance rather than monetary value.
4. Culture of service. The Library is here for the researchers. The Library is supported by scientists’ overhead, giving support to the Woods Hole Community.

New changes in recent years

1. Informatics initiatives: uBio and the NLM Biomedical Informatics Course (1992) initiated the informatics directions of the Library. Other informatics efforts include the Biodiversity Heritage Library, Digarch (library collaborating with Scripps on data), development of R2R, collaborations with Andy Maffei. CIS at WHOI now contacts Library for data issues. New relationships with SCORE, IODE. The landscape for libraries is changing rapidly.
2. Redefining data and the Library’s role in data: Data library came out of G&G Library. Need to draw the line for what is library’s responsibility, appropriate. Issues of ownership – should data be separate between the two institutions (MBL and WHOI). DLA collects data from all WHOI ships and vehicles. National deep submergence facility – supported by WHOI, but the obligations not clear.
3. Evolution of the Joint Library: Strengthened library by having a single director. MOU between MBL and WHOI reinforces and gives structure to relationship
4. Center for Library and Informatics (CLI) and History and Philosophy of Science (HPS) new at MBL.
**Values**
The Library maintains a culture of collaboration, community, sharing and service to the Woods Hole scientific institutions and to the global community.

**Collections**
- We acknowledge that our physical collections have been important to the library in the past and now are the foundation of new projects as we move into the future.
- The primary motivation for having materials is that they are useful, usable and relevant to the Woods Hole scientific community.
- The Library is the keeper of the history of the institutions, preserving the past for the community and making it relevant to the present.
- The Library is also the keeper of the intellectual output of the scientific community.

**Relationships**
The Library is a contributing active member of larger library and academic communities. We are committed to openly sharing skills, resources, and expertise.

**Service**
- A culture of service is pervasive throughout the Library. The Library is forward-thinking in library and information science, with the goal of providing the best and innovative services to the Woods Hole scientific institutions and the global community.
- The Library connects and links information objects.
- Major library services are accessible 24/7 to patrons, including patrons that are remote from the physical library (e.g. shipboard, field stations).
- The Library supports and advocates for open access and open source materials.
- The Library promotes and increases awareness of science and scholarship in Woods Hole.
- Services must be sustainable.

**Staff**
- The Library provides opportunities for professional development of staff. Staff development is needed to meet the Library’s strategic goals.
- The Library maintains mutually beneficial relationships with our volunteers, respecting, acknowledging and appreciating the value of their service.
- The Library recognizes the importance of staff work that is not traditionally valued by academic measurements. This work includes the creation of intellectual products other than peer-reviewed publications.
- A well-integrated joint library with a single director is essential to the efficiency of the Library.

**Vision**
*Meeting information needs in the Woods Hole scientific community and beyond.*
Mission
To advance scientific scholarship and education through innovative research, library services, collaborations, and informatics tools.

Current Services (in alphabetical order)
- Acquisition of serials, monographs and databases: including exchanges, licensing
- Archives
- Best practices vocabularies, ontologies: development and training, metadata standards
- Bibapp
- Biomedical Informatics and other informatics courses
- Cataloging, authority control
- Collection documentation: cataloging, metadata, procedures
- Collection space, maintenance and evaluation
- Cooperative Library projects such as BHL/IA, BISC, Herbarium, BLC, BCO-DMO, SCOR, IODE, Data Management IMLS Project
- Copyright education and information
- Course reserves
- Data services including data ingest and curation, new data initiatives, data management plans
- External committee work - staff participate in the larger institutions
- ILL and Document Delivery
- Institutional research services - what people here are doing; metrics and promotional services, providing information during Center reviews (related to BibApp)
- Liaisons to research departments/Centers/Programs
- Library as place
- Library Space application and memberships
- Presenting at conferences and keeping current
- Public IT (copiers, computers, etc.)
- Records management
- Reference Services
- Remote Access to Library collections
- Tours, instruction, public outreach
- Web Services: Provide environment to build Drupal websites
- WHOAS - Woods Hole Open Access Server

Short Term Goals (to be accomplished by the end of 2012)
1. Implement a full-scale Library Liaison Program to engage with assigned departments or centers to develop strong working relationships and mutually beneficial communications.
   Status (July 2012): Rolled out to two WHOI departments and all the MBL centers/programs

2. Work to resolve SFX issues. Research other link resolver solutions. Continue to work with the vendor, Ex Libris, on problems. Consider defaulting to the library catalog instead of A-Z list.
   Status (July 2012): ILS stable, ExLibris came on site for system training in July. Re-evaluate SFX in new year.

3. Create Library brochure and other marketing strategies.
   Status (July 2012): Have a couple of brochures for services, not one for entire Library.
4. Collection development and space assessment of print collection.  
*Status (July 2012):* Initial review conducted

5. Implement metadata standards with longer term goal to become a resource for controlled vocabularies, standards, metadata, etc. Develop a webpage of information.  
*Status (July 2012):* DLA coordinating instrument vocabulary work with SeaDataNet and R2 R. Library data management page updated in Spring. Ongoing work with WHOI Informatics Group and broader community.

6. Advocate for consortium-wide standards and best practices in ILL regarding non-returnable. To ensure a stable quality service in the environment of constantly evolving formats and platforms, it is more important for libraries to collaborate on Interlibrary Loan processes. As a small library with limited resources, it is important for MBLWHOI to have a voice in the process.  
*Status (July 2012):* The BLC Library Directors agreed to make this a priority. Interlibrary Loan Librarians will create best practices and create a model for implementing those practices across the BLC in the fall of 2012.

7. Evaluate technical skills and general skills. Work on cross-education. Staff members should share their technical skills (ex. XML) and basic understanding of data management.  
*Status (July 2012):* Sharing some general information, need to implement formal system.
Highlights from the Joint User Committee Meeting, November 7, 2018

- Make library more visible & create data center to bring people together.
- Library needs to be community space
  - Goal of library to connect all institutions
- New journal purchases
  - Had to cut things over the last 5 years
  - Users want immediate access
  - Only so much ILL w/ journal before you have to pay
  - Adding more Nature journals
  - Encourage users to let library know of any access needs- can get a quote
  - Been cutting year after year, but want to make sure library knows of areas where they could add for users
- Library depends on word of mouth communication
- Data services:
  - Offer assistance at every level of data/research lifecycle
  - Data management plans
  - DMP tools
    - Planning for proposals for funders
    - Familiar w/ best practices
    - Public DMPs available as examples
    - Your profile- keep everything you have done
    - Acquisitions & processing: continuous education: file backup, etc.
    - OSF, Gitlab, open lab book tools
    - Goal= document everything you do
    - Happy to provide specific help or resources as requested
  - Make sure data is in a repository
    - Need common descriptions & file names, etc.
  - Teach good habits on data
  - WHOAS Repository:
    - Open Access Server
      - Capture presentations & posters too
      - Take media: models, movies, software, etc.
      - Lots of data
      - They can embargo the data
      - Not always the most proper place to store
        - Data should always have a home
  - Committee member question: How discoverable is the data? Via Google?
    - Pretty good: trying to make sure discoverable
    - Do not publish anything you aren’t allowed to publish
    - Open to undergrad work as well from all institutions- good for their future
  - Github for software
Committee member comment: would be useful to have classes, etc. to share their information and concepts especially on data
  - Have funding- offering software carpentry
    - Wait list & workshops are full
  - Could use some other type of opportunity to fill this need so more institutions can be involved.

Give data management resources
  - Data education talks, etc. – library will come and present to you
    - Will walk through examples if requested.

I mentioned webinar idea to one of the committee members after the meeting was adjourned and he had positive remarks especially if they focus on data management and data services.
References


Thank You Note to Lisa Raymond & Jennifer Walton

Dear Lisa & Jennifer,

Thank you very much for the opportunity to partner with your library this semester. Throughout this process, you have both been very responsive and helpful not only as I initially collected information on your library, but also through the drafting and finalizing phases of my report. One of the highlights of this experience was being able to attend the Joint User Committee meeting held by your library. Through this meeting, I was able to see first-hand how you interact with your user base and how they respond to the efforts produced by the library. This experience rounded out my research and made a huge impact on my project plan and recommendation, so I thank you for allowing me to be present at the meeting and to be immersed in the communications between you and your users.

I have learned a great deal this semester, not only within my class content of marketing and assessment, but also regarding the missions, purpose, and impacts made by the MBLWHOI Library on its community. It has been a pleasure to learn about your library and to see the many ways in which it brings high quality services and resources to is exemplary scientific community. I appreciate your mentorship, your feedback, your encouragement, and your time in assisting me with this project. This partnership has allowed me to grow and gain new skills that will benefit me in my career.

Thank you for sharing your knowledge and time with me this semester. This will be an experience that I will always remember.

Sincerely,
Rebecca Corlett


**Librarian Evaluation Form**

Partner Librarian Evaluation of IST 613
Value, Planning, Marketing, & Assessment Project

Student Name:
Librarian Name:
Library Name:
Brief description of project:
Total hours spent with student:

**About The Student’s Work…**
Your impressions of the student’s *analysis of the library’s current value*:

Your impressions of the student’s *recommendations for future developments*:

Your impressions of the student’s *literature review*:

Your impressions of the student’s *project plan*:

Your impressions of the student’s *marketing plan*:

Your impressions of the student’s *assessment plan*:

Overall impression of the *quality and usefulness* of the student’s project:
Do you plan to use portions of the student’s project in your work? __ Yes __ No

**About The Assignment…**
What did you like best about your participation in this assignment?

What would you change about this assignment?

Would you be willing to work with students in future semesters?

*Thank you so much for the time, energy, and enthusiasm you contributed to this project and our student’s experience!*

Please return this form electronically to [mbowlest@syr.edu](mailto:mbowlest@syr.edu) or via postal mail to the following address:

Melissa Bowles-Terry  
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4505 S. Maryland Parkway, Box 457014  
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