

2020

HAM-TMC Library Strategic Plan - FY 2019-21

Houston Academy of Medicine-Texas Medical Center Library

Follow this and additional works at: https://digitalcommons.library.tmc.edu/library_strategicplans



Part of the [Business Administration, Management, and Operations Commons](#), and the [Library and Information Science Commons](#)

Recommended Citation

Houston Academy of Medicine-Texas Medical Center Library, "HAM-TMC Library Strategic Plan - FY 2019-21" (2020). *Strategic Plans*. 4.

https://digitalcommons.library.tmc.edu/library_strategicplans/4

This Article is brought to you for free and open access by the Library Administration at DigitalCommons@TMC. It has been accepted for inclusion in Strategic Plans by an authorized administrator of DigitalCommons@TMC. For more information, please contact digcommons@library.tmc.edu.



Strategic Plan

2019-2021

Information for Life

Executive Summary

TMC Library Mission: The Texas Medical Center Library (The TMC Library) delivers biomedical information to its member institutions for the advancement of medical education, research, and practice.

Governing institutions are represented on the TMC Library Board. All members have access to a high level of information resources for their user constituencies. During the Strategic Planning process, each operational department of the Library worked to develop goals that will move the Library into the future. These goals will be reviewed quarterly to ensure forward progress of the Library.

Members require numerous library services including classes, office hours within individual institutions, consultations, literature searches, systematic reviews, classrooms, and study spaces. Members also require expanded services. Examples of such services are: librarians attending curriculum committee meetings; the creation of Library Research Guides, which aid the user in finding what they need; the creation of YouTube video tutorials on basic, intermediate and advanced PubMed searching; and, performing detailed research to support publications including systematic reviews. The Strategic Plan promotes the continuance of these services and encourages the development of new methods to improve the user experience.

The Library's staff works every day to fulfill the information needs for our users. During the next two years, the Library will undergo a complete physical space renovation. This plan will allow and enable the Library to continue to provide a high level of service to our members and users during the renovation period and into the future.

A new website and improved systems support will allow Library users to access materials wherever they need them in a much more clear and concise manner.

This strategic plan provides new pathways to better, more responsive services, as members require. The Library is a valued partner in the educational, clinical and research arenas of our institutions. Under the direction of the TMC Library Board, these goals can be achieved.

The Role of the Library

The Texas Medical Center Library (The TMC Library) delivers biomedical information to its member institutions for the advancement of medical education, research, and practice. The TMC Library is a member-supported Library that creates a shared space on the TMC campus for the advancement of medical knowledge. Founded in 1949, the Library is an important resource that supports learning, knowledge and practice. While the Library's functions have changed in the past few years -- from a print-based collection to a suite of services that electronically deliver materials to users' desktops -- the core mission remains the same: to support learning, research, knowledge and practice for our disparate groups of researchers, students, clinicians and staff.

Today, the Library is the fundamental starting point to access trusted information resources, whether in print or digital form in the Library or at a user's device. The Library's staff provides tools and teaches techniques to sort through the millions of articles published each year to find just the right ones that facilitate and support health sciences research, medical education and patient care. Authenticated users can electronically access our robust collection anytime, anywhere, and on any device. But above all, there is no doubt that the Library is also still an active place to be, as evidenced by the many visitors who make use of the Library's physical space each year.

In 2016, the Library Building was purchased by UTHealth from the Houston Academy of Medicine. For several years, Library staff has worked to reduce the footprint of the Library by moving print resources to the Joint Library Facility (JLF) in Bryan, Texas. Moving the collections to the JLF was completed in the summer of 2018. All materials at the JLF are identifiable through the Library catalog and can be delivered within a short period of time. The Library maintains a small print collection on the TMC campus as well.

During the past year and a half, the Library Board, Board Committees and Library staff have acted to position the TMC Library for the future. Information technology upgrades have moved many Library operations to the Cloud while traditional, print materials have been moved to off-site storage. This has created space for the development of more collaborative areas in the Library. The Library also implemented Open Athens and Alma Primo. These systems will provide more seamless access to Library electronic journals and monographs and provide better statistics regarding Library use.

In August 2017, Hurricane Harvey damaged the Library's Street Level and portions of the first floor. These spaces were renovated and available for use again in January 2018. The Library will begin a major renovation of its space in 2019. The renovation plans include more collaborative space for students and faculty and more useful study space for groups and individuals.

During the Summer of 2017, Library staff engaged in a planning process that culminated in a Library Retreat. During the process, a list of priorities and needs were developed; in addition, the Library's Mission and Value statements were reviewed and revised. A SWOT analysis revealed the Strengths, Weaknesses, Opportunities and Threats perceived by the staff. Five working groups were charged to begin work on the highest priorities identified during the retreat. Additionally, the Executive Director received feedback from Board and Committee members and key user groups from across the TMC campus. Priorities include the renovation project, marketing of the Library, development of alternative sources for budgetary needs and staff development and appreciation.

Library Mission:

The Texas Medical Center Library (The TMC Library) delivers biomedical information to its member institutions for the advancement of medical education, research, and practice.

In pursuit of our mission, we will:

- Provide authoritative information.
- Acquire, manage, and disseminate biomedical information.
- Explore innovative solutions for changing information needs.
- Educate our patrons in information literacy, on techniques for using the Library's electronic resources and in critical appraisal of the biomedical literature.
- Seek to expand our services and resources to provide a state-of-the-art center for study and collaboration.
- Partner with institutional faculty, staff, and students to anticipate and serve their research and instructional needs.
- Collaborate with other institutions within and outside of TMC and support their missions.
- Collect, preserve, and provide valuable historical collections and rare materials related to the medical sciences and the Texas Medical Center.
- Improve staff skills and knowledge through professional development.

In maintaining our values, The TMC Library will always:

- Deliver timely and professional services.
- Uphold our professional standards and ethics.
- Carry out our work with integrity, accountability, and transparency.
- Provide leadership in defining the future role of the Library.

The TMC Library's greatest strength is the professional and support staff that provide expertise and skills to collaborate on research and scholarly activities, offer services and develop, negotiate and manage resources for the TMC community.

The Library has two portals. The first is the front door of the Library space in the Jesse Jones Library Building. This portal welcomes faculty, students and staff of all TMC institutions to work, study, consult with librarians and collaborate on research projects. The renovation project will be stressful for staff and for those who use the physical Library; however, the result of the renovation will be improved study and collaborative space for all TMC institutions. The second portal is the Library website. This portal provides access to the Library's electronic information. This infrastructure has been under development during the past year and has also created stress for our users and for Library staff. We expect that our upcoming new website will complete the project intended to create a better user experience. The Library has incorporated a new methodology for access to electronic materials with Open Athens. This product allows a seamless point of access to databases, electronic journals and books. Additionally, the Library has incorporated Alma/Primo as our catalog and user interface. This new product, selected in conjunction with the Texas Health Sciences Library Consortium (THSLC), will also provide better access to Library materials. Finally, a website developer has been selected to recreate the Library's web presence. It is our expectation that these three products -- the new website, Alma Primo and Open

Athens -- will provide a new electronic portal. Both portals to the Library are under construction but we anticipate that the new portals will create better and more useful user experiences.

The TMC Library Board of Directors

The TMC Library Board of Directors is made up of representatives from its eight Governing Institutions. The Library's Bylaws stipulate that these members be appointed or reappointed by the institutions' Presidents each year.

Board members have an obligation to: educate themselves about the affairs of the Library; to know the financial situation; to question decisions; and, take responsibility for the Library's development. The Executive Director is hired to provide administrative and program expertise in order to implement the policies of the Board.

Summary of Board Responsibilities

Board members have the duties of Care, Loyalty and Obedience.

Duty of Care

Requires that directors be reasonably informed about the Library's activities, participate in decisions, and do so in good faith and with the care of an ordinary prudent person. The duty of care is demonstrated in the following ways:

- Attendance at Board and committee meetings
- Advance preparation for meetings
- Seeking information before voting on a matter in order to make good decisions
- Use of independent judgment
- Periodic examination of the credentials and performance of those who serve the Library
- Frequent review of the Library's finances and financial policies
- Compliance with filing requirements, particularly with respect to tax matters

Duty of Loyalty

Requires that directors exercise power in the best interest of the Library and not in their own interest or that of a related entity. The duty of loyalty is demonstrated in the following ways:

- Disclosure of any conflicts of interest
- Adherence to the organization's conflict of interest policy
- Avoidance of personal gain or benefit by virtue of relationship to the Library
- Nondisclosure of confidential information about the Library to outside parties

Duty of Obedience

Requires that directors comply with applicable federal, state and local laws, adhere to the Library's bylaws and remain the guardian of the mission. The duty of obedience is demonstrated in the following ways:

- Compliance with all regulatory and reporting requirements

- Examination of all documents governing the Library and its operations, including the bylaws
- Making decisions that fall within the scope of the organization's mission and governing documents, including bylaws

Summary of Board Roles

- Policy - Makes policy in such areas as finance, personnel, legal issues, systems.
- Legal/Finance – Ensures agency is properly managed; that government procedures are followed; uses proper judgment in all business and financial financials.
- Planning – Approves Library's mission. Approves goals, objectives and direction.
- Program – Approves all program ideas.
- Personnel – Recruits, hires, and evaluates Executive Director. Reviews and approves personnel policies.
- Board Governance – Recruits new members according to bylaws. Provides training. Maintains meeting minutes. Enforces member job description and bylaws. Provides ongoing training and development.
- Fundraising – Approves fundraising goals and plans. Participates in efforts.
- Public Relations – Represents the Library to the public and their institutions.

Library Administration

Three years ago, the Library's Finance Committee created and the TMC Library Board approved a new model of budgeting and adjusted assessments for the upcoming three-year budget cycle, based on the contributions from member institutions in 2016-2017. In FY18, three member institutions cancelled their membership with the Library (Methodist Hospital, Texas Woman's University and Houston Department of Health and Human Services). This resulted in a net loss of (\$353,432) to the bottom line of a budget that was already in the "red". In FY19, an additional two members decided to cancel their participation (Harris Health Systems, Harris County Institute of Forensic Science) increasing the net loss to (\$484,125) for FY19 and a second year of functioning with a deficit budget.

Even with the current group of members, we anticipate the financial loss in FY20 to be an additional (\$503,291). If any current members do not continue to be part of The TMC Library, there will be additional losses of that projected income as well. Cuts of \$500,000 or more to the bottom line of the Library budget would be devastating to the Library's collections and staffing/service levels.

This current three-year budgetary rubric will become unsustainable in FY20. Library staff members have not had a raise in two years, and the collections budget is flat, with no funds available to purchase new and needed resources for two years. There is also a need for additional staff (an Associate Director and an additional Reference Librarian). Library Administration will work with the Board to address a looming budget gap. The Library must continue to be an adequate partner for its member institutions' educational, research and clinical missions.

Year 1	Develop a sustainable budget that accommodates lost membership dues and funds for growth	Library Administration, Finance Committee, TMC Board
Year 1-2	Establish and fund an associate director position to provide for succession planning for leadership of the Library	Library Administration, Finance Committee, TMC Board
Year 1-2	Investigate sources for grant funding	Development Team, Library Administration, TMC Board
Year 1-2	Develop use reports (resources, visitors, IT, etc.) that are easy to read and understand for the Board and member organizations.	Library Administration, IT, Resource Management, Operations, R&I
Year 2	Create programming ideas that fit the needs of the member institutions and the parameters of funding agencies (foundations, governmental groups)	Development Team, Library Administration, TMC Library Board

Information Technology (IT)

Since the Hurricane Harvey experience, the IT group has moved many Library operations to remote vendors (Open Athens, Alma Primo) and many core operations (website, phone service) to the Cloud. Plans for other services are underway including the Library's website, a calendar system and accounting operations. Additionally, Wi-Fi services within the Library have been upgraded recently, resulting in a better user experience.

These improvements will position the IT group to focus on technology in the renovated Library space as plans are completed and work begins. A new classroom space will use laptops and wireless display screens in each classroom and small group study room. Selection of products will be a priority in 2019. Developing a support plan for public spaces will be an ongoing priority.

Year 1	Develop and operationalize new website	Website development team
Year 1	Continue to develop a seamless interface for users' access to Library resources	IT group, RM group
Year 1	Select a calendar system for space reservations	IT group
Year 1	Identify needs of staff and Library users throughout the process of the Library's renovation	Renovation Team, IT group
Year 1	Identify and recommend actions that will allow Library staff and users to continue to use Library space during the renovation project	Renovation Team, IT group, UT Health Aux. Enterprises staff
Year 1-2	Select and configure laptops and technology for classrooms	IT group
Year 1-2	Work with construction group to maintain network operations	IT group
Year 1-2	Work with the IT Advisory Committee to maintain communication among institutional members	IT group, IT Advisory Committee
Year 1-2	Evaluate use statistics of current materials	RM group, IT group
Year 1-2	Develop use reports (resources, visitors, IT, etc.) that are easy to read and understand for the Board and member organizations.	Library Administration, IT, Resource Management, Operations, R&I
Year 3	Set up and begin scheduling new classrooms	IT group

Circulation – Operations – Interlibrary Loan

The Circulation and Operations group provide the core services of the Library. Upon entering the Library, the Circulation group is the first group that Library patrons see and interact with for information and services. They are also the first line for answering and directing phone inquiries.

This group turns on the lights in the morning and welcomes visitors throughout the day. They verify visitors' credentials, enter their credentials into the Library system, assist patrons, answer the phones and troubleshoot any problems that Library staff and visitors might have. They are also responsible for moving anything that needs to be moved in the Library. As an example, when the Library undertook the project to move print collections to the Joint Library Facility, it was this group that packed every box for shipping.

Another one of this group's functions is to communicate with Building management and the many vendors who maintain our specialized air conditioning, fire prevention, safety and security. Additionally, the Interlibrary Loan (ILL) Lead works in this group. This ILL service is responsible for obtaining access to materials that are not owned by the Library or retrieving items owned but that are in offsite storage.

This group will be impacted greatly by the planned renovation. As frontline service personnel, they will be required to be in the Library whenever the Library is open and accepting visitors. They will be the people to whom visitors bring concerns about noise or safety issues for resolution.

Year 1	Participate in planning and scheduling renovation project activities	Operations group
Year 1-2	Monitor Interlibrary Loan statistics and costs associated with the service	Interlibrary Loan, Library Administration
Year 1-2	Monitor and report visitor use statistics	Circulation
Year 1-2	Develop use reports (resources, visitors, IT, etc.) that are easy to read and understand for the Board and member organizations.	Library Administration, IT, Resource Management, Operations, R&I
Year 1-2	Provide support to staff as they move from space to space throughout the renovation	Operations group

Resource Management (RM)

Resource Management is the group of Library employees responsible for the selection and curation of subscribed databases, journals and books that comprise the Library's collections. Their roles include vendor negotiations, licensing, and working with the various groups and consortia from which the Library selects materials (SCAMeL, UT System Digital Library).

This group's work during the past few years has laid the groundwork for the Library's renovation. Their review of the journal and monographs (books) collection allowed the TMC Library to participate in the Joint Library Facility in Bryan, TX. This project, jointly hosted by the University of Texas and Texas A&M, created a space that allows member institutions to contribute materials from their individual collections to a permanent holding facility that is accessible to member libraries. Our participation in the project allowed the Library to continue to "own" our materials and hold them offsite, thus allowing the Library space to be repurposed as collaborative and study space for our own users. If we did not participate in the project, the Library would have had to simply throw away thousands of volumes to make room for this freed up space.

Resource Management is primarily responsible for managing content and maintaining access via the Alma/Primo discovery system. Working with the Resource Advisory Committees, this group of employees implements an informed process for evaluation, acquisition, cataloging, use and accessibility of Library materials.

Year 1	Fine tune access to materials via Open Athens, Browzine, Alma/Primo and databases	RM group, IT group, Research and Instruction (R&I) group
Year 1	Review usage and access policies	RM group
Year 1	Identify new resources needed by constituent users	RM group, R&I group
Year 1	Continue to develop a seamless interface for users' access to Library resources	IT group, RM group
Year 1-2	Work with Resource Advisory Committee to discuss acquisitions decisions	RM group, RAC
Year 1-2	Evaluate use statistics of current materials	RM group, IT group
Year 1-2	Continue to work with institutional partners to create a mechanism for seamless access to Library resources	RM group, IT group
Year 1-2	Develop use reports (resources, visitors, IT, etc.) that are easy to read and understand for the Board and member organizations.	Library Administration, IT, Resource Management, Operations, R&I

Research and Instruction (R&I)

The Research and Instruction group is responsible for providing information, instruction and research to faculty, students, residents, clinicians and researchers affiliated with the TMC Library. These services are provided via e-mail, chat, text, phone and in-person. Research and Instruction Librarians are liaisons to all schools served by the TMC Library; they develop curriculum integrated instruction classes, tutorials, library orientations, research guides and presentations on how to use Library resources. Classes are offered at the institution or in the Library classroom. Other services include faculty and student consultations in-person or via Skype or Webex, and literature searches and systematic reviews for faculty, residents, researchers and clinicians.

Additionally, Liaison Librarians provide 48 hours of on-site office hours per month at the institutions and attend curriculum committee and distance learning meetings at the medical schools.

Year 1	Identify existing campus resources	R&I group
Year 1	Develop a visual identity	Branding and Marketing Team, R&I group
Year 1-2	Develop relevant learning materials and resources to meet the evolving and diverse needs of users for educational programs	R&I group
Year 1-2	Develop methodologies to communicate and promote Library services	Branding and Marketing Team, R&I group
Year 1-2	Teach research skills to students within established curriculum courses to enhance learning experiences that make a difference in student outcomes for lifelong learning goals	R&I group
Year 1-2	Continue to train staff to assist researchers in systematic review work	R&I group
Year 1-2	Develop use reports (resources, visitors, IT, etc.) that are easy to read and understand for the Board and member organizations.	Library Administration, IT, Resource Management, Operations, R&I
Year 2	Identify opportunities for partnerships	R&I group
Year 2	Provide a forum for recommendations to improve or change Library services	Branding and Marketing Team, R&I group
Year 2	Develop a communications plan	Branding and Marketing Team, R&I group

John P. McGovern Historical Collections and Research Center (McGovern Center) and Archives

The John P. McGovern Historical Collections and Research Center (McGovern Center) and Archives are an integral part of The TMC Library. The McGovern Center contains notable historical collections on the foundations of the medical specialties, Texas medicine, rheumatology and North American public health. The archival collections focus on the development of institutions and hospitals within the TMC, the careers of Houston physicians and biographical information on Texas physicians. In addition, the archive includes manuscript collections from American rheumatologists, members of the Atomic Bomb Casualty Commission and the life sciences departments at the Johnson Space Center. Most of the Center's rare books, along with many of the photographs and manuscript collections, have been cataloged and may be searched for in the Library's online catalog.

The TMC Library Board recently charged the Executive Director to convene an Advisory Committee to provide a forum for members of the TMC Library's member institutions, the McGovern staff and the broader biomedical community to review the goals, programs and activities of the McGovern Center, recommend changes, develop long range plans and identify needed resources.

Goals for this group will be developed through this Advisory Committee.

Renovation Team

The TMC Library renovation team will redefine the Library as a place that provides expertise and comfortable space for Library users. Changes to the Library space will provide areas for collaborative work and study.

The team will provide guidance to staff and Library users during the Library's renovation to assist in continuing to provide a high level of service. They will communicate ongoing work impacts to all user groups and to Library staff.

The team will provide guidance to staff during the Library renovation. The team is assisting with planning and selecting appropriate technology and furniture for all the new Library space so that it will be friendly, useful and collaborative for students, faculty and researchers.

Year 1	Identify needs of staff and Library users throughout the process of the Library's renovation	Renovation Team, IT group
Year 1	Identify and recommend actions that will allow Library staff and users to continue to use Library space during the renovation project	Renovation Team, IT group, UT Health Aux. Enterprises staff
Year 2	Work with Library staff and constituents to troubleshoot issues with the new construction as use of completed spaces begins	Renovation Team, IT group

Development Team

The Development Team will identify opportunities for fundraising and grant opportunities that may supplement the Library's Operating budget.

Year 1	Perform a survey of staff needs and ideas for alternate sources of Library funding	Development Team, TMC Library Board members
Year 1-2	Investigate sources for grant funding.	Development Team, TMC Library Board members
Year 2	Create programming ideas that fit the needs of the Library and the parameters of funding agencies (foundations, governmental groups, etc.)	Development Team

Branding and Marketing Team

The TMC Library staff provides many services that enhance the TMC community of learners and researchers. A previous study commissioned by the Library identified as a major weakness the mechanisms that the Library uses to communicate our skills and values to the greater TMC community. One of the greatest needs identified during the summer 2017 staff planning process was the development of a Library communication plan. This plan should nurture existing relationships and identify new partnerships and relationships for future collaboration.

The Library should be viewed as an essential partner within the TMC for the realization of common goals, resulting in wider use of Library services and recognition of Library contributions.

Year 1	Develop a visual identity	Branding and Marketing Team, R&I group
Year 1-2	Develop methodologies to communicate and promote Library services	Branding and Marketing Team, R&I group
Year 1-2	Develop a communications plan	Branding and Marketing Team, R&I group
Year 2	Provide a forum for recommendations to improve or change Library services	Branding and Marketing Team, R&I group

Staff Development Team

One of the TMC Library's greatest strengths is the professional and support staff that provide expertise and skills to collaborate on research and scholarly activities, offer services and develop, negotiate and manage resources for the TMC community. Investing in our most important resource is a top priority. The Library will strategically invest in the emerging skills and expertise necessary to meet the TMC institutional mission and goals.

The team will promote professional agility, education, mentorship and professional development opportunities. They will also assess future staff and training needs.

Year 1	Identify training needs of staff	Staff Development Team
Year 1	Survey Library staff to determine unmet training needs	Staff Development Team
Year 1-2	Identify low cost or free classes that will fill the needs	Staff Development Team
Year 1-2	Develop a plan for classes and activities to meet identified knowledge gaps	Staff Development Team

Renovation Team

Charge:

Identify needs of staff and Library users throughout the process of the Library's renovation.

Identify and recommend actions that will allow Library staff and users to continue to use Library space during the renovation project.

Members:

Dorothy Cobbs

May Yang

John Torres

Ryan Casantos

Nick Green

Branding/Marketing Team

Charge:

Increase the visibility of the Library's services to the TMC Community.

Develop a marketing plan that creates opportunities for outreach to TMC Library customers and communities.

Develop marketing materials in both paper and electronic formats that will highlight current Library services and products.

Develop a new logo.

Members:

Marcus Spann

Beatriz Varman

Nha Huynh

Travis Holder

Philip Montgomery

Staff Development Team

Charge:

Identify training needs of staff.

Identify low -cost or free classes that will fill the needs.

Survey Library staff to determine unmet training needs.

Develop a plan for classes and activities to meet identified knowledge gaps.

Members:

Amy Sisson

Joanne Romano

Terri Smalls-Hall

Development Team

Charge:

Identify opportunities for fundraising, and grant opportunities.

Investigate sources for grant funding.

Create programming ideas that fit the needs of the Library and the parameters of funding agencies (foundations, governmental groups).

Members:

Beatriz Varman

Philip Montgomery

Scott Aikens

Lara Oullette

Travis Holder

Board Members TBD

“1001 Ways to Recognize Employees” Team

Charge:

Develop and propose cost-effective, creative ways to boost staff morale.

Investigate ideas that will improve the quality of the Library as our workplace.

Members:

Elizabeth Herrera

Charles Njilefack

Alisa Hemphill

John Torres

Liz Hickman

Library Future Trends

Empowering libraries for the future is an essential role of the librarian, and it begins with the effective use of space, resources, and community. The TMC Library continuously monitors new trends in service models and technology and adjusts core services to reflect those identified trends. While several organizations monitor and document trends, the organization EDUCAUSE has a long and successful history of study in this area.

The final page of the Strategic Plan reflects an infographic that documents the findings of their latest survey and study.

The TMC Library will continue to be aware of these trends and develop methodologies of service that will keep us in the forefront of new delivery mechanisms so that we can better serve member institutions.

Previously identified trends that have been implemented in the Library include:

Cloud Technologies

Cloud hosting provides more reliability, better performance, and stronger security than local implementation. It helps libraries prepare for growth and the deployment of other cost-effective technologies. The ability to work from anywhere, the flexibility of using any device, and automatic software updates are a few significant advantages.

Single Sign-on Technology (Open Athens)

A one-stop shop for students, single sign-on technology allows libraries to manage their users' login-in credentials from a centralized system that saves time with automatic account creation and updates.

2019

Key Issues in Teaching & Learning

Each year, the EDUCAUSE Learning Initiative surveys the higher education community to determine key issues and opportunities in postsecondary teaching and learning. These issues serve as the framework, or focal points, for our discussions and programming throughout the coming year. For 2019, more than 1400 community members voted and identified the following:

