

Central University Libraries
Strategic Plan
2000-2005

ANNUAL GOALS
2003-2004

Southern
Methodist
University



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Southern Methodist University
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A. SUPPORT SMU'S ACADEMIC, RESEARCH AND COMMUNITY PROGRAMS

1) Develop, manage, organize and preserve collections to support the University's instructional and research programs

a) Optimize purchasing power for collections

- (1) Identify additional opportunities for consortial agreements
- (2) Partner with campus schools and departments to secure additional resources
- (3) Evaluate and reduce duplicate resources
- (4) Review periodicals listings in targeted science and engineering departments
- (5) Monitor vendor performance through Voyager software
- (6) Study the benefits of reducing binding for JSTOR e-journals and others, in conjunction with consortial libraries
- (7) Examine binding practices for journals represented archivally in print
- (8) Participate in curricular review of new programs to prepare library impact statements

b) Improve collection management efforts to increase user satisfaction

- (1) Identify and replace missing materials where appropriate and in a timely manner
- (2) Assess stack maintenance processes so as to improve shelf order and reduce patron complaints
- (3) Continue to encourage better collection of in-house use data
- (4) Revise collection development policies and library mission statements as needed, with particular reference to limited access current periodicals
- (5) Process high priority unaccessioned collections identified through the Housekeeping/Collections initiative
- (6) Maintain appropriate cataloging levels despite upcoming staffing vacancies
- (7) Continue transfer of selected current DeGolyer materials to Fondren and de-emphasize current secondary literature acquisition
- (8) Return DeGolyer materials to LC classification as space becomes available
- (9) Complete transfer of Bridwell titles
- (10) Join the ARL initiative to provide access to hidden unique collections
- (11) Examine policies and procedures for restricted access locations, particularly in the Fondren and Science cages.

c) Merge collections where appropriate

- (1) Analyze current use of collection space throughout the FLC
- (2) Conduct vigorous weeding of unaccessioned, little-used, and duplicate material
- (3) Merge specific collections as needed, paying particular attention to the SEL McNaughton/DeGolyer/Dewey collections

d) Define and plan a library of digital resources integrated with traditional formats

- (1) Develop and provide a cohesive structure for management of CUL digital resources, led by the Digitization Committee
- (2) Continue to add digital images to existing collections; explore funding opportunities
- (3) Pursue opportunities for funding Digital Content Manager position
- (4) Implement serials management tool and assess its effectiveness for providing access to electronic journals
- (5) Work with campus departments to prepare for SMU's move toward digital theses and dissertations

e) Create a vigorous preservation and conservation program

- (1) Address preservation needs in all formats across libraries; maintain and expand workflow/treatment statistics
- (2) Develop a decision tree for preservation/reformat/withdrawal decisions across all subject areas
- (3) Refresh the membership of the CUL Conservation/Preservation Taskforce in light of staff retirements/transfers
- (4) Draft plan and timeline to expend funds donated for map preservation
- (5) Promote education and training for CUL staff in conservation/preservation techniques, to include a component in the new staff orientation/training program
- (6) Expand cooperation among campus libraries on preservation/conservation practices
- (7) Work with library consortia, such as AMIGOS, to optimize preservation efforts

f) Develop a separate University Archives Department by 2006

- (1) Secure funding for a full-time position and operating budget allocation
- (2) Secure appropriate space, particularly for staff processing and storage
- (3) Work with SMU legal office and other campus units to obtain appropriate and relevant SMU archival documents on a regular basis
- (4) Start planning to prepare for SMU's centennial in 2011
- (5) Work with campus units to develop SMU Record Retention/Management plan
- (6) Improve, reorganize and reformat (as needed) SMU Video Archive

2) Facilitate access to a wide variety of resources and services for use by SMU's faculty, students, staff and affiliated users

a) Promote CUL resources to the SMU community

- (1) Provide more publicity about existing materials and services
- (2) Expand current user education workshops to reach the widest possible audience
- (3) Increase promotion of library resources to the faculty, focusing on electronic resources and services and the new serials management tool
- (4) Find ways to promote library materials within current course management systems
- (5) Develop a 'proof of concept' pilot project for a library/course resources system utilizing and linking Access.SMU, Voyager, electronic resources, WebCT, ILLiad and digital reference services.

b) Develop the CUL web site as the gateway to all information needs

- (1) Increase access to resources and services via the CUL web pages
- (2) Implement e-journal management web-based tool for title access to bundled electronic resources
- (3) Complete merger of individual library web pages into one FLC page
- (4) Assess current web pages to ensure they meet users' needs, in particular those of the satellite libraries and community services
- (5) Increase access to print and e-resources through web-based subject or collection user guides

c) Increase and improve delivery of services to CUL users

- (1) Develop tools to assess user needs
- (2) Promote and enhance services to distance students; evaluate new developments in authentication tools
- (3) Assess library policies, particularly in light of heightened national security issues, and modify as necessary to be responsive to users' needs
- (4) Work with Pony Express office to improve ID services for distance learning students
- (5) Improve the quality of the bibliographic database through use of vendor provided authority records
- (6) Evaluate additional Voyager e-mail notices for enhanced user service
- (7) Implement serials management system to provide better access to electronic periodicals
- (8) Support use of metadata and developing national standards to provide access to special collections and non-traditional library materials

3) Assist users in their research; work to help them increase their ability to use information resources

a) Enhance reference services

- (1) Assess CUL electronic reference services and modify where necessary
- (2) Participate in national electronic reference projects
- (3) Enhance the subject specialization services of reference staff to include faculty liaison responsibilities
- (4) Evaluate the relocation of the FLC Electronic Resource Center and Information Commons services
- (5) Assess reference service models in all CU libraries
- (6) Explore use of GIS and other global planning software to support academic program needs

b) Assess current User Education programs and work to increase user participation

- (1) Promote to all faculty
- (2) Customize programs for targeted student populations
- (3) Develop ways to involve staff from all library departments
- (4) Expand information literacy program efforts and include evaluation tools
- (5) Involve CUL in SMU's Strategic Enrollment Management and First Year Experience planning

c) Develop campus partnerships to increase information literacy efforts

- (1) Seek partnerships with academic departments and offices for expansion of library's role in information literacy instruction
- (2) Develop involvement in curriculum planning for both graduate and undergraduate courses where appropriate
- (3) Expand library outreach to educate and work with unique SMU student populations and at orientation events (e.g. international, graduate, honors, President's Scholars, AARO, First Year Experience, WOW)
- (4) Build a strategic alliance with contiguous units such as CTE, Digital Commons and Academic Computing to work toward common goals in teaching and learning.

4) Develop outreach and community programs

a) Increase campus awareness of library exhibits and events

- (1) Work on exhibits with other campus groups to highlight academic areas
- (2) Publicize CUL activities in campus press, targeted local publications, and on SMU's web pages
- (3) Expand opportunities to send CUL publications to appropriate SMU constituents
- (4) Publish a DeGolyer annual report
- (5) Celebrate the acquisition of major collections with appropriate campus/local participation

b) Analyze IIS and its mission in serving the business community

- (1) Revamp public relations materials, such as web page and information brochures
- (2) Develop expanded marketing plan, to include advertising in other campus publications
- (3) Aggressively expand customer base
- (4) Look at ways to streamline document delivery services
- (5) Develop more efficient business practices, including use of ILLiad as appropriate, and reduce expenses

c) Develop outreach efforts with campus, community and professional groups

- (1) Promote library internships with neighboring library schools
- (2) Develop partnerships and volunteer opportunities, as needed, with area schools, colleges, libraries, museums and other cultural organizations
- (3) Work with Alumni Office to develop joint initiatives

- (4) Continue working with CUL Student Advisory Council for feedback on CUL services, collections and facilities
- (5) Use the SMU Friends of the Libraries for joint sponsorship opportunities
- (6) Explore ways to integrate use of the DeGolyer collections into the SMU curriculum
- (7) Continue development of the Dallas Art Library Consortium
- (8) Participate in the SMU planning process to attract the George W. Bush Presidential Library

B. IMPROVE CUL SYSTEMS, SERVICES AND FACILITIES TO MEET USER NEEDS

1) Develop quality human resources and organizational structure to support user needs

a) Recruit, develop, and retain an excellent and diverse staff. Support and encourage professional development and training opportunities

- (1) Increase salaries and improve benefits to become more competitive; participate in TLA salary survey
- (2) Evaluate staff mentoring program
- (3) Provide training for cross-functional work to provide efficient and effective delivery of services and processing of library materials
- (4) Continue to improve student worker training programs
- (5) Provide opportunities for timely and targeted dissemination of information from professional conferences and workshops
- (6) Provide, publicize and support staff technical and management training
- (7) Continue to push down more routine processing work to students, as appropriate, and utilize vendors or Library Specialists to handle more of these tasks
- (8) Streamline librarian hiring procedures to reduce timelines and make CUL more competitive
- (9) Streamline and promote new employee setup and technical orientation procedures
- (10) Promote staff retention and manager training through support of continuing education and staff development opportunities
- (11) Continue to recognize staff for both individual and collaborative efforts

b) Organize CUL staff to effectively support library services

- (1) Assess user needs, workload demands, staff vacancies and building configurations to determine any restructuring of the organization and/or reallocation of staff
- (2) Enhance or strengthen relationships with other SMU Libraries and campus departments
- (3) Streamline workflow and policies across CU libraries
- (4) Begin to implement acquisitions/cataloging vendor-assisted products
- (5) Develop policies for providing services for CUL's many varied categories of users
- (6) Develop assessment and evaluation tools, including historical statistical profile
- (7) Work with cohort organizations (such as ULG) to collect library statistics
- (8) Continue active participation in SMU IT Strategic Planning process and other technology forums
- (9) Redefine DeGolyer staffing levels and job descriptions for more focused and efficient service
- (10) Work with the Meadows School of the Arts to develop appropriate lines of budgetary support and responsibility for building maintenance

2) Improve and enhance library information systems and related technologies to support the University's instructional and research programs

a) Improve and expand library information management systems (e.g. PONI/Voyager/PeopleSoft/MS)

- (1) Evaluate and implement future modules and functionality as appropriate; begin planning and preparation

for Voyager upgrade to Unicode

- (2) Explore new ways to streamline technical processing tasks, including vendor assisted selection, cataloging, and authority control
- (3) Strive for continued improvement with upgraded public interfaces and new systems releases
- (4) Expand EDI implementation of business transactions to other vendors
- (5) Continue to develop Voyager reports, web and database usage statistics as requested
- (6) Develop more useful in-house administrative statistics
- (7) Enable ILLiad's new ISO functionality so Underwood Law Library can replace its retired RLIN service
- (8) Assess branch libraries' specialized processing needs and adjust CIP service levels as appropriate
- (9) Establish policies and procedures for use and implementation of Voyager test server
- (10) Continue PC hardware upgrades and migration to MS XP operating system

b) Integrate library information systems with other campus/non-campus systems

- (1) Continue to promote wireless networking technology to enhance access to resources
- (2) Work with appropriate campus groups to upgrade and maintain technology in classrooms; develop plans for funding these upgrades
- (3) Continue efforts to make the SMU campus cable system as functional as possible
- (4) Explore offering vended computer printing as part of new campus convenience copier contract
- (5) Evaluate and test ITS Help Desk program for possible implementation in CUL

c) Develop CUL's ability to support digitizing, imaging and archiving services

- (1) Digitization Committee to lead efforts in developing and facilitating digital projects CUL-wide
- (2) Explore range of digital library projects for which to seek financial support and potential partners
- (3) Purchase software/hardware to expand capacity for program support
- (4) Cooperate/coordinate with other SMU departments on digitization projects
- (5) Resubmit request for UCIT funding for Digital Content Manager
- (6) Provide appropriate staff training in digital and other new technologies

3) Create an environment conducive to quality education and work

a) Provide adequate space for users, operations and collections

- (1) Continue planning process for renovation of FLC complex, to include forming SMU Oversight Committee and hiring preliminary architect
- (2) Reclaim and redesignate space currently in use by non-library tenants
- (3) Review space in all libraries on a continual basis for increased efficiency; formulate plans to relieve space shortages as needed
- (4) Complete cleaning of SIC basement preparatory to opening it up for users and/or compact shelving
- (5) Evaluate FLC Information Commons and work with ITS staff to continuously improve services/support
- (6) Assess HAL Information Commons project for additional tweaking. Expand equipment array
- (7) Work with SMU Auxiliary Services to reassess feasibility of adding coffee service/café
- (8) Improve building security in all libraries; assess security/housing issues of all cage/restricted access materials
- (9) Continue to revise disaster planning process and procedures
- (10) Keep fire emergency evacuation plans in line with campus emergency planning process; conduct regular fire/emergency drills
- (11) Complete and celebrate new Fort Burgwin library facility
- (12) Complete new, expanded digital production area in NCMIT
- (13) Work with CTE, Digital Commons and Academic Computing to discuss the potential in developing a strategic alliance that would optimize efforts to achieve common goals
- (14) Improve space utilization in the DeGolyer; continue to revamp procedures and reduce extraneous collections

b) Provide equipment and furnishings that enhance the productivity of users and staff and secure

regular building maintenance services

- (1) Replace the carpet in the HAL
- (2) Plan and obtain funding for compact storage where needed
- (3) Renew and refurbish CUL buildings as needed and opportunity permits to ensure that all buildings are welcoming, safe, and well-functioning environments
- (4) Provide adequate workspace with ergonomic furniture and equipment for staff members to carry out their duties
- (5) With FOL grant, purchase tablet PC for use by staff and promote availability of laptops for staff loan
- (6) Secure reliable, user-friendly, copy card and change machine services through participation on the Campus copier committee

c) Maintain and upgrade equipment, furniture, and appearance of physical environment

- (1) Maintain and upgrade library classrooms, offices, public equipment, furniture, carpeting, paint, and physical appearance on a scheduled and/or grant-funded basis
- (2) Continue to dispose of badly worn, obsolete and unrepairable furniture/equipment
- (3) Develop a climate-controlled environment for proper preservation and storage of all rare and unique collections

4) Develop the necessary fiscal resources to augment collections, systems, staffing, and facilities

a) Work with campus partners to make most effective use of fiscal resources

- (1) Improve current Annual Fund solicitation tools to increase CUL gift accounts
- (2) Work with the SMU Library Executive Board to develop its potential and capability for fund raising
- (3) Ensure that CUL cost centers develop robust income streams and reduce operational costs
- (4) Expand collaborative efforts with other SMU departments in order to broaden our audience for FOL activities and increase membership
- (5) Collect library data for benchmark schools in order to position SMU's libraries to secure additional resources if necessary
- (6) Analyze SMU library statistics and compare with ARL libraries in order to assess the viability of SMU applying to become an ARL library

b) Engage in a vigorous program of fund-raising and library development

- (1) Expand the membership and fund raising initiatives of the Friends of SMU Libraries
- (2) Develop funding plan to endow appropriate library positions (e.g. the Dean and Director, CUL; Director of the Hamon Arts Library; Film archivist)
- (3) Develop a plan to fund an SMU Archival Program for SMU's centennial celebration
- (4) Complete and mail planned giving brochure
- (5) Organize campaign to solicit gifts from the Class of '99 for bricks/pavers in their Senior Class plaza
- (6) Continue to solicit new members for the Fondren Library Leadership Circle
- (7) Create new FOL brochure
- (8) Continue to solicit funds for bricks and pavers in the FOL/Faculty plazas
- (9) Continue to develop targeted fund raising opportunities (e.g. Zero-K Run, WW2 Govt. Docs. Digital Library, Bywaters Special Collections, GIS computer lab)
- (10) Identify and cultivate donors with specific library-related interests
- (11) Position CUL to play a greater role in the next SMU capital campaign