Central University Libraries
Strategic Plan
2000-2005+

ANNUAL GOALS
2005-2006

Southern
Methodist
University

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Southern Methodist University
Strategic Plan 2000-2005+

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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) Continue to review periodicals listings
      (4) Continue to move along the print/electronic continuum where possible; cancel/discard print and purchase new electronic subscriptions where appropriate
      (5) Reduce binding for JSTOR e-journals and others, in conjunction with consortial libraries
      (6) Participate in curricular review of new programs to ensure that each one assesses library impact
      (7) Develop improved periodicals pricing reports for Collection Development
      (8) Prepare for a managed program of periodicals cuts if additional funding is not granted

   b) **Improve collection management efforts to increase user satisfaction**
      (1) Identify and replace missing materials where appropriate and in a timely manner
      (2) Reinitiate the stack maintenance program after analysis of programs at other institutions
      (3) Increase the study of the usage of specific online periodicals and other electronic resources; encourage better in-house data collection overall
      (4) Revise collection development policies and library mission statements as needed, with particular emphasis on federal and state government documents
      (5) Process high priority unaccessioned collections identified through the Housekeeping/Collections initiative
      (6) Prioritize 'non-book' collections for processing or discard
      (7) Begin using vendor-assisted cataloging and acquisitions services to handle routine materials
      (8) Continue transfer of selected current DeGolyer materials to Fondren and de-emphasize current secondary literature acquisition
      (9) Complete transfer of Bridwell titles
      (10) Continue to provide access to hidden unique collections
      (11) Examine policies and procedures for restricted access locations, particularly in the Fondren and Science cages; develop improved user access to these collections
      (12) Review and weed permanent reserve collection
      (13) Complete processing of the Fred Wendorf Collection at Fort Burgwin
      (14) Conduct CUL-wide inventory of map collections and recommend appropriate action

   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, in particular the CMIT media collections
      (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) Implement strategies and technical standards for an integrated and cohesive digital library: create a vision

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statement
2. Demonstrate successful digital projects
3. Continue to explore funding opportunities for operating budget and ongoing salary support
4. Provide information on new digitization guidelines and encourage their adoption: evaluate the digitization planning process and guidelines
5. Continue to assess e-journal management tool for its effectiveness in light of need to acquire complementary link-resolver tool
6. Expand digital theses and dissertations submissions/archiving, working with University archivist

e) Create a vigorous preservation and conservation program
1. Address preservation needs in all formats across libraries, including digital formats
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. Promote education and training for CUL staff in conservation/preservation techniques
5. Expand cooperation among campus libraries on preservation/conservation practices

f) Develop a separate University Archives Department
1. Enhance and develop the newly recreated University Archives facility
2. Expand the shelving and processing space
3. Secure continued funding for the Archivist from the SMU Administration
4. Work with SMU legal office and other campus units to obtain appropriate and relevant SMU archival documents on a regular basis
5. Continue the process of relationship building across campus to generate goodwill and build alliances
6. Work with SMU's PR staff to educate SMU alumni and staff and solicit appropriate materials
7. Start planning to prepare for SMU's centennial in 2011
8. Develop guidelines for processing archival materials
9. Work with campus units as appropriate to develop SMU Record Retention guidelines

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. Find ways to promote library materials within current course management systems or with new products
4. Continue to provide information on digitization guidelines and procedures for digital initiatives
5. Solicit materials for the University Archives

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. Assess e-journal management web-based tool for title access to bundled electronic resources
3. Assess current web pages to ensure they meet users' needs, in particular those of the satellite libraries and community services
4. Increase access to print and e-resources through web-based subject or collection user guides
5. Update CUL staff website to include information on the FLCC renovation planning process

c) Increase and improve delivery of services to CUL users
1. Develop tools to survey user needs and assess usage patterns across the CU Libraries in order to become more responsive, with particular attention to changing curriculum/program needs at Fort Burgwin and the Information Commons spaces
2. Investigate new developments for authentication tools

(3) Assess library policies, particularly in light of heightened national security issues, and modify as necessary to be responsive to the needs of users and the institution
(4) Improve the quality of the bibliographic database, to include assessing vendor provided authority records
(5) Expand use of 'in transit' item status for better tracking of new materials
(6) Support use of metadata and developing national standards to provide access to special collections and non-traditional library materials
(7) Evaluate CMIT's media collection; weed as needed and evaluate the various formats available

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) Continue to enhance and refine the subject specialization and liaison services of reference staff
(3) Evaluate the newly created Information Commons areas in both the Hamon and the FLCC; adjust services/hours as needed
(4) Assess reference service models in all CU libraries
(5) Promote use of GIS and other global planning software and consult with faculty to support academic program needs
(6) Implement Apple iPod checkout for sound recording reserves

b) Assess current User Education programs and work to increase participation
(1) Promote to all faculty
(2) Customize programs for targeted student populations
(3) Develop ways to involve staff from all library departments where appropriate
(4) Develop appropriate teacher-training opportunities for User Education staff
(5) Expand information literacy program efforts and include evaluation tools e.g. ETS ICT Literacy Assessment software
(6) Involve CUL in SMU's Strategic Enrollment Management, First Year Experience and curriculum planning efforts

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 e.g. orientation events
(2) Target particular groups of students, such as President's and Hunt Scholars for customized User Education programs
(3) Continue involvement in curriculum planning for both graduate and undergraduate courses where appropriate
(4) Continue to partner with contiguous units, such as CTE and Academic Computing, and work toward common goals in teaching and learning; strengthen the Strategic Alliance group

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 SMU constituents
(4) Celebrate the acquisition of major collections with appropriate campus/local participation

b) Analyze IIS and its mission in serving the business community
(1) Continue to work on developing high-class public relations materials and web site
(2) Develop expanded marketing plan, to include advertising in other campus publications
(3) Aggressively expand customer base

(4) Evaluate effectiveness of ILLiad for billing and administrative functions, in partnership with ILL
(5) Share staff between IIS and ILL as needed

c) Develop outreach efforts with campus, community and professional groups
   (1) Promote library internships with neighboring library schools and colleges
   (2) Develop partnerships and volunteer opportunities, as needed, with area schools, colleges, libraries, museums and other cultural organizations
   (3) Work with Alumni Office to feature CUL's programs/collections more often
   (4) Continue working with CUL Student Advisory Council for feedback on services, collections and facilities; create student advisory board in the HAL
   (5) Use the SMU Friends of the Libraries for joint sponsorship opportunities e.g. the CMIT Film Festival
   (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
   (9) Investigate the potential for working with SMU and community groups to produce archival video programs and to complete the Pfautsch Memorial Recording Project

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
   (2) Continue to analyze all open positions in light of reduced SMU funds
   (3) Continue to evaluate staff mentoring programs and expand where necessary
   (4) Develop a forum to specifically support staff enrolled in library school
   (5) Provide training for cross-functional work to provide efficient and effective delivery of services and processing of library materials
   (6) Streamline student worker hiring processes, provide training for student supervisors and improve student training programs
   (7) Provide opportunities for timely and targeted dissemination of information from professional conferences and workshops
   (8) Provide, publicize and support staff training opportunities in technology, management and presentation skills
   (9) Continue to push down more routine processing work to students, as appropriate, and utilize vendors or Library Specialists to handle more of these tasks
   (10) Continue to streamline and promote employee orientation and exit procedures
   (11) Promote staff retention and manager training through support of continuing education and staff development opportunities, including Performance Management series for EC, Strengthsfinder assessment for all staff, LEAD programs, HR Partnership courses, Customer Service training and Phoenix programs
   (12) 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 as part of FLCC renovation planning
   (2) Enhance or strengthen relationships with other SMU Libraries and campus departments
   (3) Provide more leadership and oversight for CUL circulation departments by creating a head of access services position
   (4) Streamline workflow and policies across CU libraries, including cash handling procedures, gift processing

and circulation policies/procedures
   (5) Take advantage of more vendor products and services e.g. Electronic Resources Management Systems
   (6) Continue to focus on developing customized policies for providing services to CUL's many varied categories of users
   (7) Develop improved assessment and evaluation tools, including a historical statistical profile
   (8) Work with cohort organizations (such as ULG) to collect library statistics
   (9) Continue active participation in SMU technology forums
   (10) Create DeGolyer staff and policy manuals to help eliminate confusion and clarify mission
   (11) Work with the Meadows School of the Arts to develop appropriate budgetary support and building maintenance responsibility for the Hamon
   (12) Restructure CMIT staff duties to focus on event technology support and digital production for the campus (as a result of transferring classroom technology support duties to ACS)
   (13) Investigate ways to further consolidate and streamline all personnel/student hiring and tracking functions
   (14) Develop streamlined support model for centralized CUL administrative functions

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
      (2) Implement 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) Refine in-house administrative statistics
      (7) Assess branch libraries' specialized processing needs and adjust CIP service levels as appropriate
      (8) Develop benchmarking standards for all CUL units where appropriate
      (9) Evaluate ERMS products to streamline backroom electronic processing
      (10) Implement the 'In Transit" status for branch library materials
      (11) Implement digital conversion standards in CMIT

   b) **Integrate library information systems with other campus/non-campus systems**
      (1) In conjunction with ITS, continue to evaluate and maintain CUL wireless networking technology
      (2) Continue efforts to make the SMU campus cable system as functional as possible, to include investigating potential for fiber network distribution
      (3) Investigate possibility of utilizing planned ITS Help Desk program for implementation in CUL
      (4) Work with ITS and appropriate SMU Libraries representatives on the next phase of SMU Portal development
      (5) Explore possible content and authentication integration; investigate interface with CMS
      (6) Continue work on testing video streaming/file transfer
      (7) Add an additional internal SMU channel to the cable line up for internal content delivery across the campus
      (8) Evaluate joint CITA Lab/Information Commons and iPod reserve service

   c) **Develop CUL's ability to support digitizing, imaging and archiving services**
      (1) Enable the 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 as well as potential partners
      (3) Purchase software/hardware to expand capacity for program support
      (4) Cooperate/coordinate with other SMU departments on digitization projects

(5) Provide appropriate staff training in digital and other new technologies
(6) Begin program to scan library materials invoices
(7) Pursue opportunities to fund the Digital Content Manager permanently and to fund a digital photography lab
(8) Enhance the digital recordings database to include electronic files of edited masters that are accessible for online editing; include all raw footage and final copies
(9) Update Apple Production software for all video/audio editing and DVD mastering
(10) Update digital production equipment to include new HDTV standard

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 working with architect and targeted user/staff constituencies
(2) Reclaim and redesignate space currently in use by non-library tenants
(3) Review space in all libraries 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) Partner with SMU Auxiliary Services to provide library links in Hughes Trigg Student Center
(7) Improve building security in all libraries; assess security/housing issues of all cage/restricted access materials
(8) Continue to revise disaster planning process and procedures
(9) Keep fire emergency evacuation plans in line with campus emergency planning process; conduct regular fire/emergency drills
(10) Continue working with CTE, Digital Commons and Academic Computing to develop projects for the Strategic Alliance that would achieve common goals
(11) Improve space utilization in the DeGolyer; continue to revamp procedures and reduce extraneous collections
(12) Evaluate options and plan new hi-tech collaborative study area in the FLCC

b) Provide equipment and furnishings that enhance the productivity of users and staff and secure regular building maintenance services
(1) Continue to replace the carpet in the Hamon, floor by floor
(2) Plan and obtain funding for compact storage where needed in all libraries
(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) Promote the availability of laptops and other shared specialized equipment e.g. color laser printer, large format printer

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) Update CMIT viewing room with new projector, surround sound and AMX controls
(4) Evaluate CMIT's equipment needed in the viewing area to support the media collection

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 and grow donor base
(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 from benchmark schools in order to position SMU's libraries to secure additional resources if necessary
(6) Analyze SMU library statistics in order to assess the viability of SMU becoming an ARL library

b) Engage in a vigorous program of fund-raising and library development
   (1) Position CUL to play a central role in SMU's capital campaign
   (2) Launch CUL annual fund campaign
   (3) Develop funding plan to endow appropriate library positions and create new special collections endowments
   (4) Secure continued funding for the Digital Content Manager
   (5) Continue working with the board of the AWSW to complete the *Remember the Ladies!* $1M goal
   (6) Develop new initiatives and find new venues to promote and market CUL, with an emphasis on identifying corporate and foundation prospects
   (7) With the assistance of SMU Public Affairs, develop a cohesive CUL marketing plan to include events and new services
   (8) Continue to solicit new members for the Fondren Library Leadership Circle
   (9) Develop PR plan for the FLCC renovation project: create a website and post progress reports
   (10) Develop building naming opportunities and donor pyramid for FLCC renovation
   (11) Expand the membership and fund raising initiatives of the Friends of SMU Libraries
   (12) Increase the FOL presence on the CUL website; create new FOL brochure; improve FOL management processes and infrastructure
   (13) Identify and cultivate donors and collectors with specific library-related interests
   (14) Continue to develop targeted fund raising opportunities