Central University Libraries
Strategic Plan
2000-2005

PROGRESS UPDATE
2001-2002

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 & research programs**
   Major gift collections accepted include the Melvin Shaffer collection of WWII army photographs; the complete set of Metropolitan Opera transmissions; the Edmunds B. Holloway papers (documenting Texas and the Southwest from 1848-60); Prof. Emeritus Robert Anderson's musical library; Lewis McNaughton Jr.'s library; Sotheby's and Christie's auction catalogs from Valley House Gallery.

   a) **Optimize purchasing power for collections**
      (1) Identify additional opportunities for consortial agreements
      Created a new TICUL/PHOENIX consortium to secure electronic access to Wiley journals. Worked on a deal with Kluwer to gain access to all Kluwer journals through a consortium made up of all Texas academic libraries except the University of Texas system.
      (2) Partner with campus schools and departments to secure additional resources
      Continued partnerships with the Cox School of Business (through the BIC) and Bridwell Library to purchase EIU ViewsWire, ScienceDirect, and Early English Books Online. Secured additional funding from the History Department to support book purchases as well as the Early English Books Online. Reached agreement with the Law Library to help fund Kluwer Online when the consortial deal is signed. Acquired over 3000 books from the Bridwell Library that were no longer relevant to their collecting strengths. The Chemistry Dept. assisted with the purchase of ACS publications.
      (3) Evaluate and reduce duplicate resources
      Progress made in many areas especially where prompted by the merger of the Science and Fondren collections. Reduced duplicate electronic and print resources by canceling selected Project Muse titles in print and the CRC Handbooks on line. Continued to reduce duplication among CUL and other SMU libraries. Aggressive reference collection weeding project conducted at HAL with plans to continue annually.
      (4) Review periodicals listings in targeted science and engineering departments
      Compiled and reviewed journal listings in Biology, Computer Science and Engineering, Economics, and Physics. Filled gaps in print periodical holdings for Kilobaud, and Byte. Added electronic backfiles of ACS journals.

   b) **Improve collection management efforts to increase user satisfaction**
      (1) Identify and replace missing materials where appropriate
      Ongoing. Large list of missing materials generated and missing items replaced when available and appropriate. Progress made in replacing periodicals and high use Texas area maps. HAL shelf-read the entire collection to identify lost and missing items and to withdraw/replace as appropriate.
      (2) Rethink current reshelving processes so as to return books to the stacks more quickly
      Restricted Access Task Force created to assess current criteria for housing in the various 'secure' cages. Report due end of September.
      (3) Develop a program to collect meaningful in-house use data

GIRM staff developed new statistical gathering process for reference assistance and collection use. Historical data added to regular Public Services report.

    (4) Revise collection development policies as needed
Rewrote policy for FLC reference desk resources. Government Documents Depository selection profile reviewed and adjusted. CUL Collection Development Policy updated to include electronic formats. Art and Art History policies reviewed. HAL selected new approval plan with Worldwide Books to enhance the museum publications collection as well as paring down Italian approval plan. No progress made on redefining CUL special collections.

c) Merge Science and Fondren collections where appropriate

    (1) Standardize processing and shelving policies throughout the Fondren Library Center (FLC)
Work ongoing to standardize criteria for placing materials in 'secure' shelving.

    (2) Rethink current use of collections space throughout the FLC
Work continued on recent mergers of microform, government documents and periodical collections and service points. Made more workspace available for the FLC Preliminary Shelving area by removing ILL materials.

    (3) Conduct a vigorous weeding initiative of unaccessioned, little-used and duplicate material
Work continued on weeding of science reference and permanent reserve collections. A significant number of unaccessioned books were weeded and sold to an out-of-print dealer. Duplicates discovered in the merger process were also sold. Duplicate foreign language dictionaries from the reference mergers were weeded as well as duplicate items from the SEL basement in the former Herbarium area.

    (4) Merge collections as needed
Government documents collections merged. Several Science collections identified for relocation and/or integration into Fondren and vice versa.

    (5) Evaluate Electronic Resource Center applications and databases
Number of standalone databases reduced to a minimum and replaced, where possible, with web-accessible products.

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

    (1) Refine processes for acquisition, organization and management of digital resources
Taskforce created to study the need for a software solution to managing digital collections. Processes for acquisition of digital resources have been refined

    (2) Address collection development issues, particularly in the sciences.
Periodicals allocations in the sciences are now obsolete due to the continued purchase of electronic "big deals" that cross disciplines.

    (3) Work with campus departments to prepare for SMU's move toward digital theses and dissertations
Ongoing. A voluntary program of digital dissertations will begin next year; negotiations this year paved the way.

    (4) Expand current collections of digitized images
In cooperation with CIP and the CULISS, GIRM staff completed work on a fully functional digital library pilot project, "Historic Government Publications from the Second World War (1939 - 1945)". GIRM received over 400 photographic images -- negatives, prints, and digital scans -- taken by former Army photographer Melvin C. Shaffer. These images will be integrated into the WWII digital library pilot project. Funding successfully pursued from TIFB LB9 program for the digitization of the Tyler, Texas Black Film Collection at the HAL.

e) Create a vigorous preservation and conservation program

    (1) Draft a comprehensive preservation program statement for CUL
No progress.

    (2) Assess preservation needs in all formats across libraries

GIRM staff devised cost-effective and easily implemented system for archival-quality storage of the physical documents in the WWII digital library. The Map Library established a preservation and conservation program focused on rare maps. All but highest use 16mm films were moved from CMIT to the HAL vault. "Master" videotapes are also in the process of being moved to HAL.

(3) Develop financial and staffing support for this program
DeGolyer had 74 Spanish-language imprints deacidified. No progress in other areas of the FLC.

(4) Provide adequate physical facilities for centralized preservation unit
Potential space is being reviewed.

(5) Promote education and training for CUL staff in conservation/preservation techniques
All CUL staff were invited to the North Texas Chapter of the Guild of Bookworkers' Annual Meeting in the FLC. Others attended AMIGOS conservation workshops.

(6) Improve conservation/mending workflow and record keeping
Flags and forms for binding/mending redesigned and workflow made more efficient. Second year of FLC staff shelving campaign helped identify items in need of attention. HAL materials reviewed for treatment during the 2nd floor shift.

(7) Expand cooperation among campus libraries on preservation/conservation practices
Some staff went to Bridwell for specialized training.

(8) Work with library consortia, such as AMIGOS, to optimize preservation efforts
Plans are underway to bring AMIGOS staff to campus in the fall to teach a digitization workshop.

f) Develop a separate University Archives Department

(1) Secure funding for a full-time position and operating budget allocation
No real progress, although discussion with the Provost and alumni has raised the issue to the President's level.

(2) Secure appropriate space for both public study areas and staff processing and storage
Potential space being vacated by non-library tenants in the SEL and in FLW. A recommendation for a campus-wide Records Retention/Management operation, possibly under the aegis of CUL, has been made.

(3) Work with University legal office and other campus units to obtain appropriate and relevant SMU archival documents on a regular basis
Ongoing.

(4) Start planning to prepare for SMU's centennial in 2011
Interested community members have been added to the LEB in order to advocate for this need.

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
CUL home page news postings continued. New book cover feature added. GIRM staff secured SMU and Dallas-area publicity for the WWII digital library pilot project, also presented to SMU Alumni. Implemented electronic "new acquisitions" list to promote new materials. Redesigned SMU Libraries web page to highlight libraries and collections with PONI link on new page. Added "quick search option" link to PONI from web page. Developed a brochure for other "true" distance students to be sent to Engineering students with their videotape deliveries.

(2) Expand current user education workshops to reach the widest possible audience
User Education added new workshops exclusively for faculty (Plagiarism Information, Connecting from Your Office), as well as new subjects (EndNote, Choosing the Best Electronic Resource). DeGolyer held special sessions for students in classes taught by Jim Breeden (History) and Peter Bakewell (History).

(3) Increase promotion of library resources to the faculty, focusing on electronic resources and services in particular
Ongoing. Approximately 25 subject-area finding guides revised at Fort Burgwin.

(4) Market NCMIT services to campus departments and schools not currently served
Done. All departments contacted and service provided as needed. Discussions underway with Law, Business and Theology Schools regarding expanded AV support. New brochure developed.

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
Successfully implemented pilot program for Chat Reference Service. Will be rolled out in full service mode with new software – OCLC's QuestionPoint – in the fall. CULISS web pages updated to include more instructions and information on requesting technical support. Investigated joining LVIS (Libraries Very Interested in Sharing) to reduce ILL borrowing costs as well as a new ULG consortium. Number of bibliographic resources available from OR web pages increased to over 7000.

(2) Add and promote electronic information literacy tutorials
In partnership with Digital Commons, TILT program has been readied for Fall '02 implementation.

(3) Assess current web pages to ensure they meet users' needs, in particular those of the satellite libraries and community services
Refined and revised instructions to users on the Hold/Recall page of OPAC, as recommended by Circ. Task Force. HAL web pages updated – complete redesign planned for September roll-out.

(4) Increase access to print and e-resources through web-based subject or collection user guides
GIRM staff revised department web pages to assist patrons in the location and use of Census 2000 data. User guides on the web were reorganized

c) Increase and improve delivery of services to CUL users

(1) Develop tools to assess user needs
A subcommittee of the SMU Libraries' Voyager OPAC Team conducted extensive usability testing of PONI during the spring semester 2002. Results were compiled and are guiding efforts to change search options and PONI design during Summer 2002. HAL completed user satisfaction survey. Action taken in a number of areas.

(2) Promote and enhance services to distance students
Ongoing. Offered Digital Reference Service and worked more closely with the School of Engineering

(3) Assess library policies and modify them as necessary to be more responsive to users' needs
In response to student and faculty suggestions, the Curriculum Collection is being allowed to circulate. Evaluated and tested e-mail notices for future implementation of courtesy notices. Implemented pilot "Notify Me" service for users to request materials being processed. Both involved cross-library agreement on library policy and procedure changes. Analyzed ILL costs and charges and made a successful proposal to the CUL EC to raise lending charges to the prevailing rate of peer institutions. A proposal to start charging out-of-state non-AMIGOS/BCR members for book loans was also approved and put into effect July 15, 2002. Increased the delivery speed and copy quality of articles sent to ILL users by installing open book scanner. HAL began using system reports and staff to renew study room material, saving time and inconvenience for the students/faculty.

(4) Improve the quality of the bibliographic database through addition of new records and ongoing maintenance.
A sub-group of the OPAC Team developed naming conventions to standardize public display location information. Over 10,000 NetLibrary bibliographic and authority records added to Voyager. OCLC system number integrated in previously loaded records. The Hedberg Library is now accessible after cataloging was completed. Microfilm format data was added to periodicals records. Bibliographic records for all standing orders are now visible to users. Considerable maintenance was done on acquisitions database.

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

   a) *Enhance reference services*
      (1) Assess the electronic reference service and modify where necessary
         'Chat reference' pilot successful. Will roll out in full production mode – and with new vendor - during Fall semester. The chat pilot also involved the creation of a new 'general help' page on the CUL website to direct users to various kinds of library assistance.
      (2) Enhance the subject specialization services of reference staff to include faculty liaison responsibilities
         Increased efforts at faculty outreach. Faculty Liaison pilot project proposal developed. GIRM staff have begun discussions with history faculty re classroom use of material available via the WWII digital library pilot project.
      (3) Assess use of DeGolyer Library for the past 5 years and adjust service levels as needed
         DeGolyer eliminated Tuesday evening hours from its schedule after consulting with the History Dept. and reviewing usage patterns for the past 5 years.

   b) *Assess current User Education programs and work to increase user participation*
      (1) Promote to all faculty
         Ongoing (See A2a2)
      (2) Customize programs for targeted student populations with an emphasis on online tutorials
         Ongoing. WebCT customization classes attend by public services staff. TILT to be implemented Fall '02.
      (3) Develop ways to involve staff from all library departments
         Ongoing. All Library staff encouraged to participate in tours, first week survey, and other outreach activities.
      (4) Expand information literacy program efforts
         Ongoing. User Education efforts continue through the First Year Experience survey, as well as planning for increased library involvement in research curricula and resource evaluation.

   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.
         Ongoing. Discussions underway with Mass Communication and Rhetoric Dept.
      (2) Develop involvement in curriculum planning for both graduate and undergraduate courses where appropriate
         Ongoing. UE working with LEC instructors for the library portion of their curriculum. Useful information is expected to come out of the First Year Experience survey results.
      (3) Expand library outreach to educate and provide opportunities to unique SMU student populations (e.g. international, graduate, honors, President's Scholars)
         Ongoing. Public Services staff developed orientation programs for President's Scholars and all new international students. UE staff worked with the Career Center on many projects including the fairs and graduate school series

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 area
         Prepared displays and tours for 150th anniversary Open House at Fort Burgwin. FLC Exhibits Committee mounted well-received exhibits throughout the year. Two exhibits on the George and Mary Foster lecture were created in the area cases outside of ISEM Library. Exhibit case placed in the FLC main office. Worked with

SMU News and Information, <u>Daily Campus</u> and Park Cities papers to increase visibility in print and on the Internet. Larger attendance at most events, including the SMU Faculty Recognition Event, is a good indicator that publicity works.

(2) Publicize CUL activities in campus press, targeted local publications, and on SMU's home web page ("What's Making News" and "This Week at SMU")
Many events publicized in both local and campus press, e.g. Women's Museum partnership; WWII digital library; DeGolyer exhibits; Jerry Bywaters Special Collections; as well as being commented on for having quiet places to study and frumpy looks in some areas.

b) **Analyze Industrial Information Services and its mission in serving the business community**

(1) Revamp public relations materials, such as web page and information brochures
Work has begun.

(2) Develop expanded marketing plan
Ongoing. Transactions and revenues have increased. Name changed from Industrial Information Services to IIS. Over 60 member companies contacted. Made in-house presentations at Marconi Corporation, Frito Lay Inc. and Alcatel USA.

(3) Aggressively expand customer base
Increased new memberships, continued pursuing renewals.

(4) Look at ways to streamline document delivery services
Ongoing.

(5) Develop more efficient business practices
Gross revenues increased although operation suffered net loss. Work ongoing with ILL to combine billing services.

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

(1) Promote library internships for neighboring library schools
Internships sponsored in FLC Reference and the HAL.

(2) Develop partnerships, as needed, with area schools, colleges, libraries, museums and other cultural organizations
Developed TIFB grant proposal for DVD conversion of Tyler, Texas Black Film Collection for distribution to targeted Texas public schools, libraries, and museums. DeGolyer hosted 42 events in the Texana Room, including those sponsored by the Age of Steam Museum and the Mid-Cities Rail Fan Club. Fort Burgwin librarian worked with museums in Taos to obtain loan of three exhibit cases used for archaeological displays during Open House. Worked with the BRIT to select an OPAC vendor. Former librarian Dorothy Amman was honored by TLA at the centenary celebration as a Texas Library Champion. CU Librarian was elected to Town & Gown.

(3) Work with Alumni Office to develop joint initiatives
GIRM and CIP staff participated in a WWII digital library presentation to Golden Mustang alumni. Alumni Office invited CUL staff to various fundraising and spirit events.

(4) Continue working with CUL Student Advisory Council to assess CUL services, collections and facilities
The "?" box questions/responses were placed on CUL web and online feedback options were centralized. The OPAC Team worked with several members of the CUL SAC for usability testing and one member gave a presentation at the May LEB meeting.

(5) Use the Friends of the Libraries for joint sponsorship opportunities
The FOL co-sponsored events with the Clements Center for Southwest Studies and the Faculty Senate as well as supporting the Dallas Public Library's centenary celebrations.

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
Completed the plan to raise minimum salary to $20,000 with some alleviation of salary compression. Received funds to begin long-delayed plan for promotion of librarians. Flex-time encouraged as appropriate in various areas.

(2) Develop and encourage participation in staff mentoring program; evaluate annually
Ongoing. No new staff signed up. Evaluation of previous year's efforts almost complete.

(3) Promote advantages of the university environment during the hiring process
Ongoing. Proposal sent to HR to return librarian vacation benefits to 1995 levels.

(4) Provide training for cross-functional work to accomplish efficient and effective delivery of services and processing of library materials
CIP provided training/orientation for staff across CUL and SMU Libraries, added training documentation to CIP web pages and held its own staff development day. HAL provided cross-training for selected student assistants.

(5) Provide opportunities for timely and targeted dissemination of information from professional conferences and workshops
LEAD sponsored CUL brown bag lunches to share information from Voyager Users Group Conference and ALA.

(6) Solicit staff input regarding training needs; provide, publicize and support necessary technical training
In progress. Facilitated discussion between LEAD and CULISS to investigate ways to provide computer training for staff. Ten CUL staff attended Voyager Users Group Conference; two staff attended administrator training on ILLiad interlibrary loan software; one staff member attended a specialized printer training class; others attended various ALA, TLA, and AMIGOS conferences on technical issues. ITS provided on-going computer software training. CIP staff were invited to participate in the Ebsco Academic Seminar and Blackwell Senior Management Seminar. All CUL staff participated in meeting management workshops.

(7) Review and revise CUL-wide training for student workers in public services departments
All periodicals department student training has been reviewed and revised in the last year with very high levels of retention. HAL's survey showed no improvement when minimally increasing hourly salaries. HAL students began using online Voyager tutorial for training. CIP created a Student Advisory Group to monitor workload, advertise positions, create student project list and plan Student Appreciation Day.

(8) Revamp hiring, promotion and reclassification procedures
Hiring and reclassification guidelines completed. Promotion guidelines for librarians in progress. Work has begun on orientation materials and related processes.

(9) Develop CUL-wide orientation materials for new staff
Used and adapted CIP model for new hires and continued to revise as necessary. CULISS provided orientation program section on technology-related staff procedures and resources for new staff.

(10) Promote staff retention and manager training through support of continuing education and staff development opportunities
Ongoing. Many staff took advantage of HR courses. Several positions reclassified, staff were promoted and increased to full-time in some cases. Provided training to supervisors on performance evaluation procedures.

(11) Recognize staff for both individual and collaborative efforts

Created new CUL team award to recognize cross-divisional efforts. First recipient was the Recycling Ad Hoc Group with an honorable mention to the Exhibits Committee. Student Appreciation Day created in CIP, which also recognized all staff members' anniversaries and birthdays.

b) Organize CUL staff to effectively support library services

    (1) Assess user needs, staff workload demands, and building configurations to determine any restructuring of the organization and/or reallocation of staff
    Reorganization efforts took place in many areas: FLC Periodicals Department was moved under the direct supervision of Director of Public Services with a later move to report to the Director for Collections. The Reference Services reorganization is well underway with FLC Reference staff working on restructuring the provision and maintenance of reference services to make maximum use of and get maximum benefit from staff resources and skills. The EC was regrouped into a series of structured networks and a smaller management team created – the Dean's Policy Group – to allow for a shorter decision-making process and speedier response to changing technological environment and issues. DeGolyer hired a new director, said goodbye to the archivist/curator and held the position open but added a part-time cataloger to its payroll. Courier position eliminated and responsibility transferred to SMU mail services. CIP periodical check-in reassigned to students and professional staff reallocated accordingly.

    (2) Enhance or strengthen relationships with other SMU Libraries and campus departments
    Several staff members appointed to SMU-wide IT strategic planning committees. Digital Management Study Group formed with representation from other SMU libraries. Voyager Teams and Automation Technology Steering Committee, with representation from all SMU libraries and ITS, continue to work together to set priorities and make recommendations on Voyager system functionality.

    (3) Streamline workflow and policies across CU libraries in particular in the binding function
    Redesigned binding/mending forms and streamlined the process. DeGolyer orders are now sent directly to CIP staff. HAL gift book processes further streamlined - set number of books being sent to CIP weekly. Circulation Taskforce streamlined procedures for creating proxy accounts and checking out materials to those accounts. Campus-wide procedures were developed for handling materials requested through online hold/recall. Procedures developed for distributing notices generated through online renewal.

    (4) Reassess processes in light of Voyager integrated information systems and collaborative efforts
    Periodicals database re-assessed and development put on hold due to improvements in Voyager. Periodicals staff will continue to work with CIP and CULISS staff to determine effective ways of retrieving and managing price-per-title/use information. Efforts are on going to work across modules to utilize Voyager. Examples include e-mail notices; 'notify me' function for books being processed; circulation proxy functionality; and EDI for acquisitions.

    (5) Develop policies for providing services for CUL's many varied categories of users
    Instituted the online 'Notify Me' service.

    (6) Develop assessment and evaluation tools; collect and use data to improve library services in light of SACS recommendations
    The Director of Public Services and other staff responded to questions and comments submitted to the "?" box in the FLC foyer. Responses were also placed on CUL web pages. All user feedback was archived and centralized in online feedback options. CUL had representation on several campus IT committees as a result of a major SACS recommendation to develop an SMU IT strategic plan to support all campus departments.

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 (PONI/Voyager/ILLiad)

(1) Evaluate and implement future Voyager modules as appropriate
Digital Management Study Group Task Force began studying several potential digital collection management solutions. GIRM staff successfully implemented Endeavor Information System's Citation Server to deliver WWII digital library pilot project. "Notify Me" form was implemented in "Request" portion of Voyager module. The OPAC team improved the look of PONI based on results from usability testing. New proxy functionality made available in Circulation module

(2) Explore new ways to streamline technical processing tasks
Utilized macro software, wireless laptops in library stacks and other areas as needed to streamline technical processing tasks. Voyager Teams worked across modules to coordinate workflow changes that will benefit all libraries. Implemented bulk load of Western Americana records for DeGolyer (around 6000 records). Automated holdings updates in OCLC via EDX. Implemented NetLibrary bulk loads to a) integrate OCLC system number in previous load, b) create authority records for 18,000 NetLibrary records, and c) add 10,000 new records. Provided CULISS technical assistance for Bridwell to Fondren collection transfer. Expedited DeGolyer ordering processes by using provisional records and credit card payment. Increased use of the Internet for ordering materials, particularly in out of print and rare categories.

(3) Strive for continued improvement with upgraded public interfaces and new systems releases
Ongoing. With the PONI upgrade to version 2001.1 in Summer 2002, the Voyager OPAC team introduced new functionality for users including the ability to save records, searches, and search preferences. The PONI Usability subcommittee of the Voyager OPAC team recommended several interface changes based on the PONI usability testing conducted with the SMU user community during Spring 2002. Continued to refine and improve the implementation of ILLiad at CUL. Added ability to send custom e-mails for status updates and requests for more information, created a special template for Texpress Label printing, refined procedures for handling overdue ILLs and requests for ScienceDirect articles. Solved persistent problems with Law's RLIN processing and print templates. Corrected ILLiad invoicing problem so that IIS will be able to test for use. Improved efficiency of the ILL operation, particularly in electronic article delivery and Ariel matching, thereby dramatically reducing check-in/delivery time. Reordered title section of the OR index so it is divided letter-by-letter rather than by segment.

(4) Initiate electronic business transactions through the use of EDI
Completed implementation of EDI for CUL Ebsco invoice renewal. Other vendors will be added as identified.

(5) Develop more useful OPAC and database usage statistics
Examined PONI log files to analyze for potential information gathering. Log generated was of limited use due to numerous bugs with reported information categories, although the report was useful for showing actual search strings and search type used. Further analysis of WebVoyage log files is being tested using WebTrends reporting software. Usage data for electronic databases is provided to public services and collection development staff who need them for collection development decisions or reports.

(6) Upgrade network capability in conjunction with ITS to improve speed of access to electronic resources
Done. TIFB grant funds used to upgrade network capability. At Fort Burgwin, installed a T-1 line that expanded electronic access from one computer to more than 15, including one in the library.

(7) Investigate use of e-mail notices
Ongoing. Performed testing of e-mail notices and recommendation approved to implement e-mail courtesy notices.

(8) Develop Voyager reports, to include title-by-title lists of periodicals, standing orders, and books arranged by fund and/or subject with price
Ongoing. New reports written in several formats for use by CD staff.

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

(1) Implement wireless networking technologies to enhance access to resources
Done. Implemented wireless technology in key areas of all libraries. Investigated the feasibility and application of wireless in the classrooms. Utilizing TIFB funds, completed installation of wireless networking throughout Fondren Library East, SIC, designated portions of the DeGolyer Library, CMIT, ISEM, and all public areas of HAL.

(2) Enhance public printing and copying capabilities
CUL benefited from the Windows 2000 server upgrade to the UniPrint vended printing system and Pharos software upgrade to version 5.0.

(3) Work with appropriate campus groups to upgrade and maintain technology in classrooms and to develop plans for funding these upgrades
Ongoing. Updated student PCs in User Education classroom (323) with TIFB funds. CMIT completed the design and installation of equipment in the Dedman Life Sciences building. Partially completed update/repair of designated classroom equipment. Worked with Instructional Technology Subcommittee to identify future classroom needs and make recommendations for inclusion in plan. Work almost completed for CMIT technology installations in the Jerry Junkins Engineering building.

(4) Develop and implement plans to make the SMU campus cable system as functional as possible until the Belo grant is fully implemented; contribute as needed to redesign plans
Ongoing. Some work begun in cooperation with Journalism dept. Some equipment purchased from Belo Foundation funds and plans made for additional purchases. No progress made on cable upgrade.

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

(1) Identify possible sources of funding for digital library projects
Ongoing. Remaining Smallwood Foundation funds have been applied to equipment needs for the WWII digital library pilot project.

(2) Purchase software/hardware to expand capacity for program support
Ongoing. New Digital Management Study Group established to study online collection management tools.

(3) Cooperate/coordinate with other SMU departments on digitization projects
CULISS provided support as needed for new Bridwell digitization project. Graduate students in the Clements Department of History digitized a recent exhibition, "Destination Mexico." With support from the Texas Humanities Council, "Destination Mexico" will be a traveling and a virtual exhibit.

3) Create an environment conducive to quality education and work

a) Provide adequate space for users, operations and collections

(1) Develop a unified Fondren Library Center complex where one can move within that complex without having to go outside
Planning process begun. Funding for architectural plans secured.

(2) Develop strategies to reclaim space currently in use by non-library tenants (e.g. Digital Commons, Academic Computing, Computer Science dept.)
Much success. Space reclaimed in several floors of the SIC and FLW. Partnership formed to reclaim all the Academic Computing lab space on the third floor of FLW by relocating that unit in a jointly staffed Information Commons on the first floor of FLE. Utilized reclaimed Digital Commons space in FLW for a combined work/equipment storage area. Reclaimed Rooms 9 and 10 in the SIC basement from the Biology Dept. and Room 364 on SIC's 3rd floor from CSE Dept. for CUL use.

(3) Complete the relocation and combination of current periodicals sections in Fondren and Science into a comfortable space conducive to research and study with convenient copying and related services

Done. New furniture provided by the President through the Capital Campaign. Additional chairs provided by other donors.

(4) Review space in all libraries on a continual basis; formulate plans to relieve space shortages in all libraries as needed
Ongoing. Initial plan developed, held preliminary meeting with architect. Initial internal planning group established. New shelving installed at HAL and all stacks reconfigured on second and third floors.

(5) Assess and improve building security in all libraries
Much progress made. Circulation and Reference clarified and finalized Opening and Closing procedures. A committee was formed to review FLC, CMIT, and DeGolyer building security and make recommendations. SMU Police Dept. made several crucial security recommendations. Circulation Supervisor added new building security responsibilities to job description. New procedure for deleting and adding library staff entry (Diebold Card Reader System) to the libraries was implemented. Security signage has been placed in designated areas of the FLC. Some locks have been re-keyed. Proposals for additional cameras and DVR system included in security team report. The committee completed its work and recommendations were presented to the EC in late July. As a result, a security review team was formed to assess building security in the FLC Complex on an ongoing basis and to make recommendations for actions to be taken to address high priority needs. Coordinated work on various emergency exit doors and alarms for improved operation. Created a wheel chair access terminal on the first floor of SEL.

(6) Overhaul current disaster planning process and procedures
Ongoing. Work was begun on FLC Building Emergency Manual and CUL emergency personnel database.

(7) Update fire emergency evacuation plans and distribute to all staff; conduct regular fire drills; review emergency exit signage
Done. Fire Evacuation floor plans were posted throughout FLC. Two successful fire drills were conducted. Regular Spring fire inspection was conducted by University Park Fire Marshall. Began routine monitoring of fire extinguishers in CUL buildings to ensure readiness. HAL exit signs repaired.

b) Provide equipment and furnishings that enhance the productivity of users and staff and secure regular building maintenance services

(1) Assess and improve current microfilm location, services and equipment
Ongoing. FLC Microforms Areas merged and relocated to SEL to provide a unified service point with Periodicals staff more easily available to assist library patrons. Periodicals Librarian received a FOL grant ($6,000) for new digital microform equipment. A guide to trouble-shooting microform equipment problems has been created. Periodicals staff have instituted a logging process to document equipment problems

(2) Develop plans and obtain funding for compact or off-site storage of lesser-used materials where needed
DeGolyer installed more compact storage at Legacy.

(3) Renew and refurbish CUL buildings as needed and opportunity permits to ensure that all buildings are welcoming, safe, and well functioning environments
1st floor FLE was re-carpeted. FLC reference desk was redesigned and repositioned. President's Partners grant was obtained to purchase furniture and area rugs for the Newspaper and Periodicals Reading Area. 4th floor conference room renovated with donor funds. FLC Security Review Team made recommendations related to providing a safer environment. Developed plans for new library building at Fort Burgwin in response to donor funding opportunity.

(4) Provide adequate workspace with ergonomic furniture and equipment for staff members to carry out their duties
Ongoing. Several staff received new ergonomic equipment. Currently maintaining a collection of laptop units with wireless card option for loan to staff to enable more efficient & productive work in areas of the libraries where there are no PCs. Special monitors, ergonomic mouse devices, special keyboards, and other equipment were

provided as needed. Optical mouse devices were purchased for public areas. Several flat panel monitors were purchased with grant funds for the HAL public area, the FLC circulation and reference desks. 20 new flat screen Internet PCs were purchased with grant funds for FLE to provide faster, glitzier PCs for public use. DeGolyer installed new desks/workstations for all staff. New steel shelving was added to the DeGolyer workroom for storing materials while in process. Locked cabinets added within CIP to secure DeGolyer and CMIT materials.

(5) Provide user-friendly, reliable service from CUL change machines and copy card vending machines
Ongoing. FLC Reference and Circulation staff instituted a paper log for tracking and reporting problems with copiers, card readers, and card vending machines resulting in less down time with copier-related equipment. Reporting procedure for stuck copy cards and machine problems now shared by both the Reference and Circulation Dept., resulting in better communication between library staff, patrons and vendors.

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

(1) Obtain a new roof for SEL and improve Fondren roof maintenance
Ongoing. Plans are in the works for a new roof for SEL in fall, 2002.

(2) Maintain and upgrade library classrooms, offices, public equipment, furniture, carpeting, paint, and physical appearance on a scheduled basis
Grant funding provided new PCs for FLE 323 user education classroom. Conducted inventory and analyzed desktop PCs and peripherals, targeted highest needs and replaced equipment with 45 new PCs and reinstallation of 50 higher end used PCs. Report developed to track status of refurbishing projects and used for prioritization and budget requests as well as following up with CPPO. CIP 'Space Cadets' committee maintained their own workspace areas. Plan developed for library-wide management of staff lounge kitchen area.

(3) Develop a climate-controlled environment for proper preservation and storage of all rare and unique collections
No progress on providing humidity control. However, CPPO has initiated project to upgrade FLC HVAC and electrical systems.

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) Enhance current working relationship with Annual Fund staff to increase CUL gift accounts
Ongoing. Much work done with Annual Fund staff to ensure that libraries are included in all annual fund mailings. Targeted opportunity developed for the Class of '62 to specify class gift for CUL.

(2) Work with the SMU Library Executive Board to develop its potential and capability for fund raising
Ongoing. Considerable work done with LEB both as a group and individually. LEB has successfully reached both of its fundraising goals for the past year: Staff Recognition Award Endowment, and a new opportunity – the FLC Renovation Plan funding. Appointed new board members with potential for future fundraising.

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
CUL Web Librarian loaded changes for revamped FOL web site.

(2) Investigate the concept of a young friends group
Young alums targeted with the Zero-K Run. Committee being formed to pursue this market.

(3) Develop funding plan to endow appropriate library positions e.g. Central University Librarian, Director of the Hamon Arts Library

These targets have not been a top priority and therefore there has been no progress. There is now more potential for funding with the addition of the dean's title to the CU Librarian position.

(4) Designate significant dates in CUL history as fund raising opportunities

Began investigating interest in the Edwin J. Foscue Map Library as a potential fundraising or library support project. Discussions are ongoing re raising money for the FOL endowment to coincide with its 10th anniversary this fall. Plans are underway for a fundraising drive in 2004 to sell additional bricks, pavers and benches in the Senior Class of '99 plaza. Five new bench opportunities were created for the FLC west promenade. All were sold.

(5) Pursue the addition of fund raising capabilities to the CUL web site

GIRM staff instituted an "Adopt-A-Document" program in conjunction with the WWII digital library pilot project. Added "Make a Gift to the Libraries" feature on the SMU, FOL and CUL home pages.

(6) Develop short-term plan to raise money for design document for a renovated and refurbished Fondren Library Center

Done. Worked with the LEB, Provost and other major donors to reach this goal. New 'giving circle' will be created to recognize the major donors.

(7) Expand and consolidate stewardship efforts

Ongoing. Created CUL donor database to ensure consistent contact with donors and prospects. Thank you letters and postcards (developed to thank donors for gifts under $100) sent on monthly basis to CUL annual fund donors, memorial gift donors, FOL members and others as appropriate.

(8) Position CUL to play a greater role in the next SMU capital campaign

Ongoing. Development of design document for FLC renovation positions and prepares CUL for the next capital campaign. Streamlining stewardship efforts has ensured consistent contact and ongoing relationships with the donors and friends who supported the libraries during the Campaign for SMU. Consistent library representation at DEA meetings and events will also help prepare for the next campaign, as well as the addition of the Dean's title.

GLOSSARY

ACS	American Chemical Society
ALA	American Library Association
AMIGOS/BCR	Local library services consortia
AWSW	Archives of Women of the Southwest
BIC	Business Information Center
BRIT	Botanical Research Institute of Texas, located in Fort Worth
CD	CUL's Collection Development
CIP	CUL's Center for Information Processing
CMIT	Norwick Center for Media & Instructional Technology, in CUL
CoLD	SMU's Council of Library Directors
CPPO	SMU's Campus Planning and Plant Operations
CUL	Central University Libraries
CULSAC	CUL Student Advisory Council
CULISS	CUL Information Systems Support Department
DeGolyer	DeGolyer Library of Special Collections in CUL
EC	Executive Council - CUL's management team
EDI	Electronic Data Exchange
FLC	Fondren Library Center complex
FLW	Fondren Library West building
FOL	Friends of the SMU Libraries organization
GIRM	CUL's Government Information Resources & Maps Department
HAL	Jake & Nancy Hamon Arts Library in CUL
HR	SMU's Human Resources department
IIS	CUL's Industrial Information Services, a corporate research service
ILL	Interlibrary Loan
ILLiad	New ILL online module
IT	Information Technology
ITS	SMU's Information Technology Services dept.
KLUWER	Major international library vendor
LEAD	CUL's Library Enrichment and Development standing committee
LEB	SMU Library Executive Board
NCMIT	Norwick Center for Media & Instructional Technology, in CUL
NetLibrary	Collection of electronic books
OCLC	One of CUL's primary library vendors for automated services
OR	Online Resources database and/or cross-functional team
PHOENIX	Local academic library consortium
PONI	SMU Libraries Public Online Information System - the OPAC
RLIN	Research Libraries Information Network
SACS	SMU's accrediting body, the Southern Association of Colleges and Schools
SEL	Science & Engineering Library
SIC	Science Information Center - the building which houses the SEL
TICUL	Texas Independent College and University Libraries consortium
TIFB LB9	Telecommunications Infrastructure Funding Board library grant
TILT	Texas Information Literacy Tutorial - online user education module
TLA	Texas Library Association
UE	CUL User Education Department
ULG	University Library Group consortium
Voyager	SMU's library information system, marketed by Endeavor Systems. PONI is the OPAC module
WebCT	SMU's course management software