

## **CUL Strategic Plan Progress Report 2011–2013**

The planned renovation is a major factor driving many goals, and should be considered as we prioritize goals and consider new projects.

### **Space**

Find stable, permanent space for large format photography. (4.3)

Actions completed

- Space has been found and refreshed in SIC G11. The room is now functional and operational.

Assess the use and distribution of space in DeGolyer, ensuring that we move all our materials no more than we have to in conjunction with proposed renovation. (4.5)

Actions in progress

- Shelving and cabinets added in FLE basement, FLW basement, FLW 3; collection shifting ongoing.

Assess the use of spaces in the Hamon Library, including shelving needs, user spaces, etc. Plan reorganization of spaces for 25<sup>th</sup> anniversary of the Hamon in 2015. (4.1, 4.2, 4.3, 4.5)

Actions in progress

- Acquisition and installation of new shelving is complete.
- Survey group study room use in order to plan for upgrades to physical space and technology.
- 1st floor reference area weeding and furniture replacement planned for summer, 2013.

### **Collections**

Ensure that collections are weeded to the extent possible and arranged in such a way to facilitate renovation and collection moves. (4.1, 1.4)

Actions in progress

- Provided numerous reports in support of this effort.
- PIT remains current with withdraw/location change requests. (FY2011/2012: Location changes = 24,302; Withdrawals = 27,409).
- Reference staff are reviewing and weeding the print reference collection (summer 2013).
- Lisa Wall has begun a VHS-to-DVD conversion project for films that we own on VHS, are still in local demand, and are either unavailable in DVD format or are prohibitively expensive. After conversion, the VHS tapes can be relocated to an as yet undetermined storage facility.

- Julia Stewart and Sandra Zucker are weeding the government documents collection (summer 2013).

Collections management task force to reconvene to prioritize pre-renovation collections projects. (1.4)

- Working with consortial partners (GWLA, TICUL) to identify duplicate collections and areas for weeding and possibilities for cooperative collection development and shared print repositories.
- The task force has been replaced by two renovation subcommittees: 1) General Collections Subcommittee, 2) Special Collections Subcommittee. Both groups have held their inaugural meetings and begun to identify pre-renovation collection projects.

Continue to move collections into more logical arrangements in order to facilitate renovation moves. (1.4)

Actions in progress

- Significant number of titles reclassified from Dewey to LC. (Approx. 3000 titles reclassified); Juvenile collection completed; Oversized Deweys 80% reclassified).
- Completed reclassification and interfiling of all SMU cage theses and dissertations.
- Moved both S-T from Science 1 and U-Z from West 8 to Science 2.
- Integrating QE from Science 2 into Q's on Science 1.
- Integrating Science Storage LC and Reference into regular LC collections.
- Moved the majority of Science Storage Deweys to the West stacks.

Develop timetable for processing the Helgason video gift; develop enhanced cataloging for all video materials. (1.4, 1.6, 3.2)

Actions completed

- Helgason gift processing completed including adding IMDb genre terms.
- Cataloging records for feature films are being enhanced with IMDb genre terms; these genre terms are simple and familiar (such as drama, action, thriller, and western) and should enable patrons to more easily search for movies by genre.

Update and prioritize gift collection processing housekeeping list. (1.4, 1.6)

Actions completed

- Gift collection charts were added to Inside.CUL to provide easier access for collection development staff. The charts were also updated to provide 2 charts. One chart contains only collections currently in the cataloging process; the second serves as an archive.

Allocate funds for materials in consideration of renovation.

- Collection development will prioritize print collections for replacement by electronic products in order to withdraw print collections. (1.4)

#### Actions completed

- SRRS staff are in the process of replacing portions of the print collection with electronic equivalents, including significant portions of the print reference collection. Additional JSTOR modules are being purchased which will allow us to withdraw some additional print periodicals (exact titles and the linear feet of shelving that will be freed up are still to be determined).

Implement patron-driven acquisitions model for electronic books during FY2012 in order to meet user needs and to maximize use of collection; if successful, consider implementing patron-driven plan for part of print collections in FY2013. (1.1, 1.2, 7.4)

#### Actions completed and in progress

- DDA e-book plan via YBP implemented that includes over 8,800 e-book titles. The records are in the catalog and available for use. Since March 2012, 80 of the titles were used to various extents. The majority has received 1 short-term loan, but many have received more usage than that. As of 3/1/13, 33 purchases were made and 455 total uses were made. The DDA e-book program was re-evaluated in the spring of 2013 and several modifications were made.
- SRRS is planning to purchase discovery records for the JSTOR e-book collection; exact criteria for publishers and subject areas that will be included in this effort are still to be determined.

Create and organize the digital repository in order to support SMU's expanded research agenda. (1.7, 3.2)

#### Actions completed

- Launched <http://digitalrepository.smu.edu>.

Select and implement an Electronic Resources Management system (ERM) to enhance management of electronic resources and better understand electronic usage. (1.1)

#### Actions completed

- A recommendation for licensing the Serials Solutions ERM was made to the Council of Library Directors and was approved for beginning implementation in June 2013.

### **Financial**

Raise funds to support priorities. (8.5)

#### Actions in progress

- on-going

Expand CUL donor base. (8.5, 8.7)

Actions in progress

- on-going

Complete funding for Archives of Women of the Southwest project. (8.5, 8.8)

Actions completed

- Endowment reached the (goal) level of \$1,000,000.

Secure major gifts for the Fondren Library Renovation project. (8)

Actions in progress

- on-going

Increase Tables of Content net revenue by 25%. (8.5, 8.7)

Actions in progress

- We've enabled online payments and expanded the options each year.
- Net revenue increased by 51% from 2011 to 2013.

Seek transparency in financial issues wherever possible. (7.1, 7.2)

Actions in progress

Develop program to communicate budget issues to staff. (7.1, 7.2)

Actions completed

- Progress made in the frequency of financial information to staff as needed.
- New LT members are provided financial orientation.

Assure that budgeting and expenditures for acquisitions funds are transparent to all involved; provide training for collections staff as backup to AD. (6.3, 8.4)

Actions completed

- Budgets and expenditures are reported monthly to subject liaisons for book purchases (also for AV purchases for Hamon liaisons) by the acquisitions librarian. Liaisons have responded that these reports are very helpful.

Utilize all funding sources properly and effectively. (8.3, 8.4)

Actions completed

Embark on projects only after determining total costs. (7.2, 8.4)

Actions in progress

- Progress made. on-going

## **Outreach**

Strengthen the subject liaison program. (3.4)

- A new Humanities Research Librarian, James Kessenides, has just started and brings a solid understanding of digital libraries to the position. James will coordinate the library liaisons' efforts to promote faculty use of the digital repository.
- Recruitment for a Science Research Librarian position is underway and we expect the search to be completed sometime during the fall semester.

Develop standard liaison job description to include expectations for outreach. (3.6)

Actions in progress

- Done – the liaisons developed a document outlining general liaison duties.

Provide training and support for liaisons to be active partners with faculty in addressing information literacy proficiencies in the new University Curriculum. (3.5, 5.8)

Actions in progress

- Implemented Information Literacy Program web page (<http://www.smu.edu/home/libraries/infoLit>) and Liaison Librarians (<http://www.smu.edu/home/libraries/liaisons>).
- Created table display and collateral materials to support Information Literacy Program outreach.
- The SMU Libraries Information Literacy Subcommittee met with Dennis Cordell and Vicki Hill in April 2012.
- In Fall 2012, Carolyn Carpan presented liaisons with the Student Learning Outcomes for the IL proficiencies and where to find the list of proposed courses for the IL proficiencies.
- In Fall 2012, Rebecca Graff conducted a session for liaisons on how to use curriculum mapping, how to identify key components of departmental curricula and to target critical courses for library instruction within each discipline. Continued focus on this area would be helpful for liaisons.
- In Fall 2012, Ben Toon developed a workshop for faculty and liaisons to develop assignments and student learning outcomes for IL-tag achievements. The CTE, which co-sponsored the event, canceled the workshop due to low registration, however, liaisons reached out to the faculty who were signed up. The workshop is ready to go at any time.

- In Fall 2012, Ben Toon led discussions in liaisons meeting about developing IL assignments and we created a bank of sample assignments to have on hand to share with faculty. This bank of assignments is available for use.
- A training webinar was conducted on January 10, 2013 – How to Improve Your Library Instruction: Assessment in Five Minutes (ALA Editions webinar).

Continue outreach to campus programs including the Academic Bridge Program, the Center for Teaching Effectiveness, the Altshuler Learning Enhancement Center, and the Master of Liberal Studies program. (3.6)

Actions in progress

- In an effort to establish a relationship with the Center for Development of Student-Athletes, we provided a tour for staff and incoming athletes in July, 2012. Toni Nolen, Tyeson Seale and Cindy Gautreaux presented information on the ATC, Multimedia Center and other services provided by CUL. Staff from the center have agreed to offer the FLC tour each year to incoming athletes.
- Carolyn Carpan served on the advisory board for the CTE and attended advisory board meetings.  
Liaisons tabled at the CTE's annual Teaching Effectiveness Symposium promoting an upcoming IL tag workshop for faculty and liaisons.
- All the liaisons participated in the Teaching Effectiveness Symposium and made efforts to connect with new faculty.
- Josh Lupkin presented a session at the TES with Prof. Dowling about writing effective research assignments.
- Evelyn Day served as liaison to the MLS program.
- Carolyn Carpan and Evelyn Day did presentations at MLS orientations during the course of the year.
- Carolyn Carpan worked with ALEC staff on the Residential Commons Academic Mentoring Committee.
- Carolyn Carpan discussed possible partnerships with ALEC staff to support them in building students' research skills.

Use new technologies to communicate collections, services and events to the SMU and outside community. (3.6)

Actions in progress

- Created new Marketing Item form, providing one stop shop for publicity (<https://smu.edu/cul/staffresources/marketing/>).
- Designed and created printed and electronic materials to advertise CUL events, products and services.
- Internal and External YOL (Year of the Library) activities were held.

Establish policies for posting and responding to postings on Fondren Facebook page. (3.6)

## Actions completed

### Completed

Implement the digital repository as a strategic technology that reflects the priorities of SMU while serving the broader scholarly community. Establish processes for inclusion of scholarly materials that reflect the priorities of students and faculty for online access to digital versions of SMU scholarly materials. (2.1, 2.3, 4, 4.6)

### Actions completed

- Site established; Digital Repository Advisory Board established; approval workflows in place.
- Designed and created a logo and printed materials to support Digital Repository outreach.
- The Digital Repository is up and running. To date there are 358 items in the repository, and 12,000+ full-text downloads. Charlotte Holloway is the repository coordinator. The repository is located at [digitalrepository.smu.edu](http://digitalrepository.smu.edu).

Continue redesigning and upgrading all the CUL websites, with the mobile website being top priority. (5.6)

### Actions in progress

- Redesigned Hamon Arts Library (<http://smu.edu/cul/hamon/>). Rebranded Guides (<http://guides.smu.edu/>) and Ask a Librarian (<http://askalibrarian.smu.edu/>), Redesigned Friends of the Libraries website (imminent). Also redesigned SMU Libraries site (<http://www.smu.edu/Libraries>) and Interlibrary Loan (<https://ill.libraries.smu.edu/>). DeGolyer web redesign in progress.

Develop a thin client or virtual desktop solution (in partnership with OIT) so that we can more nimbly change public computer settings and offerings to better serve library users. (2.2, 2.4)

### Actions in progress

- With OIT, the CUL Desktop Support Team (DST) held a series of meetings with vendors of virtual desktop solutions. The more pressing need for campus is to offer virtual desktop access to several major campus systems, so that phase of the project is underway and the virtual desktop solution has been tabled for now.
- Computers where SMU students, faculty and staff authenticate will benefit from the campus' new Adobe enterprise license and will have Adobe Creative Suite version 6 available.
- Microsoft software licensing for virtual desktops is prohibitively expensive, one of the chief reasons the project has been tabled for the time being.
- CUL Desktop Support Team deployed 50 new PCs, most to replace the oldest public computers throughout Fondren Library and SIC. The OS for all SMU-only public PCs was upgraded to Windows 7. Fourteen new iMacs were purchased and installed in the

Fondren Multimedia Center. The older iMacs that were replaced were refreshed with a new load and redeployed in the Fondren Information Commons. LANDesk software installed on all public computers enables IT staff to push software upgrades and license renewals easily without interfering with the user experience.

Increase Friends of SMU Libraries membership by 10%. (8.5, 8.7)

Actions completed

- We have increased the FOL membership by 15% with a 41% increase in faculty/staff membership.

Implement engaging programs to invite prospective new Friends members and effectively market CUL to the community. (3.6, 3.7)

Actions completed

- Completed -- Implemented lunch-time author lecture series open to the community.

Develop and publish a “centennial” DeGolyer guidebook/coffee table book. (3.7)

Actions in progress

- Scheduled for fall. 2013.

Complete CUL branding project. (3.7)

Actions in progress

- Branding project mostly completed including the adoption of a new logo, guidelines for logo use, standardized email signatures, partial adoption of standardized look and feel for printed materials and signage.
- Branding group has morphed into CUL Marketing Advisory Group.

### **Culture/Staffing**

Provide targeted staff training and development opportunities. (6.3)

Actions

- Several training opportunities offered for CUL staff:
  - Professional Communication Skills for Librarians –all CUL staff, January 2012.
  - Data and Assessment in the Library – for all SMU library staff, January 2012.
  - Project Management workshop – for targeted CUL staff, April 2013.
  - Amigos online workshops – for all CUL staff May, 2012.

- Implement SRRS quarterly training evaluation meetings for supervisors and staff.

Actions in progress

- Revised due to departure of SRRS Assistant Dean.
- Identify training needs for SRRS staff; follow up by SRRS department heads.

Actions in progress

- Refresher training in the YBP GOBI system was recently requested by subject liaisons as part of a regular staff meeting. Training and documentation were developed and provided by the acquisitions librarian.
- Add training components to SRRS division meetings.
  - SRRS staff have taken advantage of webinars on various topics and electronic resources. However, these webinars are typically separate meetings; SRRS division meetings are used to conduct the business of the division. Email etiquette workshop offered for all SRRS staff, October 2011
- Provide at least one training session for student supervisors.

Actions in progress

- In progress, on-going, will be completed summer 2013.
- Complete Student Employee handbook and distribute to all new student employees.
- Research services policies have been made available to student employees; a procedures manual will be written and posted on Inside.SMU during FY 2013-14.
- Expand orientation template for new employees.

Actions completed

- New Staff Hiring Procedures and Orientation Process posted on CUL Staff Resources under Personnel Procedures.
- Technology Services has a comprehensive checklist (beyond the New Employee Checklists from Library IT and HR) and scheduling templates. They are glad to share and develop into a library-wide initiative if there is interest.

- Support management development opportunities for supervisors.

Actions in progress

- Risk Management workshop (Anita Ingram) - for CUL managers, May 2012

- Offer a discussion forum for managers.

Actions in progress

- Not done yet

- Managers complete at least two HR Manager Orientation classes.

Actions in progress

- 19 of 23 managers (82%) have completed at least two classes. 18 of 23 (78%) have completed 3 or more classes – as of June 2013.
- Additional – Project management training provided April 2013.

Begin development of core competencies for specific areas, including reference and technology. (6.3)

Actions in progress

- On hold due to focus on renovation.

Enhance internal and external customer service. (5.4)

Investigate effective customer service training and provide for all CUL staff. (5.4, 6.3)

Actions

- “How to Deliver Great Customer Service” – ALA webinar for all SMU libraries staff -April 2012

Establish best practices for patron referral in circulation and reference. (7.5, 4.5)

Actions in progress

- on-going

Simplify and rewrite policies for circulation, interlibrary loan, and Map Library; make policies readily available to public on the website and to staff via Inside.SMU. (7.5, 4.5)

#### Actions completed

- Completed -- Hamon Arts Library has discussed and clarified circulation policies for all Hamon materials. Voyager system updates reflect changes and there is an improved version of policies in print and on the web.
- Completed ILL Rapid implementation.
- A Maps Research Guide is available on the CUL web site, last updated May 2013.

#### Document and clarify internal policies and procedures in DeGolyer. (7.3)

#### Actions in progress

- Has been on hold; will get renewed attention.

#### Develop and maintain a culture of open communications within the library. (7.1)

#### Actions in progress

- Created anonymous "got a question" process (<http://smu.edu/cul/staffresources/questions/>).
- YOL instapicnic to involve staff in renovation, renovation resource room implemented.

#### Provide information for all committees in the library on Inside.SMU, including charge, membership and terms of service, meeting agendas and notes. (7.1, 7.3)

#### Actions completed

- Completed: Committee list and charges completed and posted on Inside.SMU. Updates being made by CUL HR.

#### Foster a culture of assessment within the library.

- Hire new director of assessment and develop a robust assessment program. (7.5, 6.3, 6.6)

#### Actions in progress

- Director of Assessment hired.
- Began open discussions with each area regarding their processes and services offered. Described what we do well, and helped facilitate reasonable improvements. Made quick gains in several areas, such as automation using Excel, assisting with statistical recordkeeping tips, writing stronger factual descriptions for external communications, and finding ways to track stronger metrics, such as maximum patron headcounts in addition to minimum patron headcounts. Established the goal and expectation of accuracy and consistency in statistical recordkeeping as a habit. Recommended inclusive approach to developing assessment program.

- Assess staffing needs and related budget requirements in light of strategic goals. (6.2, 6.4)

Actions completed

- Completed and on-going with new University procedures.

Revise performance review form. (6.5)

Actions in progress

- Ongoing - Committee established, staff survey completed in Summer 2012; first draft developed Spring 2013; committee to continue developing forms and procedures.

Survey and enhance employee engagement. (6.4)

Actions in progress

- Conducted informal discussions and offered areas of potential enthusiasm.
- Year of the Library committee generating great opportunities for employee engagement.

Raise employee salaries to be competitive with those in other SMU divisions. (8.1, 8.2)

Actions in progress

- Progress: FY 2013 - The Provost provided funding for what we hope is the first of 3 installments to bring CUL staff to the level of SMU average for comparable positions.
- FY 2014 – some additional money provided by Provost Office; less than anticipated but did allow for closing the gap on salary inequity for some positions.