

CUL Strategic Plan Progress Report

2009-10

Goal 1

Create, organize and deliver collections that support the evolving curricular and research needs of the University community.

Goal 1 - CSF 1: Acquisition decisions are informed by and responsive to user needs as collections are systematically evaluated for curriculum support

Actions completed

- Staff in ILL, Collection Development and PTDS have developed and implemented a new model for filling ILL requests. Rather than go through traditional borrowing process, ILL requests meeting certain criteria will be sent to Acquisitions for purchase via amazon.com or other inexpensive sources.
- Online contact list of subject specialists added to staff directory application.
- For SACS, canceled little used electronic journal titles and substituted titles with heavy interlibrary loan use, resulting in heavy use of new titles and few interlibrary loan requests for canceled titles.
- Collection development policy for art and art history has been revised to better reflect current conditions and needs.
- Approval plan revised by collection development with subject specialist input in order to reflect current teaching and research needs.
- US Serial Set 1769-1989 acquired through a joint purchase with Underwood to provide better access to important government information.
- Subject specialists meet with faculty in various disciplines to assess suitability of collection priorities.

Actions in progress

- A Collections Management Task Force and Subject Specialists are reviewing select serial titles available through JSTOR for cancellation of print subscriptions and withdrawal of print backfiles.
- Investigating processes developed by VIVA to generate reports of e-resource usage statistics to inform collection development decisions.
- Continue to track and report subscription electronic resources usage data for Collection Development and subject liaison librarians and the Faculty Senate library liaison. The CUL Electronic Resources Team is working with the new CUL Director of Scholarly Resources and Research Services to develop new models of tracking and reporting e-resource usage data.
- Adding online purchase / subscription request form.
- Adding suggestion form.
- Electronic Resources Collections Committee formed to evaluate current electronic database subscriptions and to serve as conduit for new resource suggestions. Membership includes representatives from Bridwell, Underwood and BIC as well as CUL staff in public and technical services.

- Hamon subject specialists continue to meet with Meadows chairs, new faculty and constituents involved in new or changing programs so that their library needs are met.
- Music collection development policy is being completely rewritten to better reflect current conditions and needs.

Goal 1 - CSF 2: Users report that CUL collections meet or exceed their needs.

Actions completed

- Implemented a new and broader YBP approval plan in order to take greater advantage of GOBI and PromptCat services and thereby streamline the book acquisition and rapid cataloging processes.

Actions in progress

Goal 1 - CSF 3: An established inventory control program successfully manages and evaluates collections on an ongoing basis for physical condition and relevancy. Conservation and preservation are performed as needed.

Actions completed

- Inventoried Fort Burgwin Library collection; approximately 140 books were determined missing and 50 location designations were corrected.
- Storage of the Meadows concert recording collection was reconfigured to provide easier access.
- In the Hamon Library, a National Film Preservation grant has been used to preserve one of the Jones Collection's unique 35mm film prints (Carib Gold, 1956).

Actions in progress

- Continue to process collections in Bywaters Special Collection.
- Continue to write finding aids for processed collections in Bywaters Special Collections
- Continue to review rare and/or fragile archival material and/or works on paper for conservation purposes. Items are treated by a professional paper conservator prior to archival matting performed in Bywaters Special Collections.
- Examining materials in restricted access locations for transfer to circulating collections, special collections, or for withdrawal.

Goal 1 - CSF 4: Collections are easy to access, navigate, and use, both physically and virtually.

Actions completed

- MARC records for Eighteenth Century Collections Online (136,431 records) digital e-books have been loaded, and authority work on them has been completed.
- 595 SMU microform dissertations from ProQuest vaults were digitized and made available online, and links to them were added to the catalog.

- OPAC team refined the keyword search in the Library Catalog to enable researchers to find relevant materials more easily, and presented the results of this project at ELUNA 2010.
- Loaded part 1 of Early English Books Online (EEBO) (104,010 records) MARC records into catalog.
- Loaded Classical Music Library MARC records (2,786 records) into catalog and completed authority work on them.
- Assessed project and created process for cataloging of current holding for Meadows School of the Arts recital recordings. This establishes a process for materials not represented in the library catalog.
- SMU Libraries Systems “Roadmap” taskforce selected the Summon web discovery service which overlays the Libraries’ public catalog, digital image collections, subscription journals and databases, library research web guides, and more to provide to users a simple interface to access those disparate resources.
- Revised gift policy to make it more restrictive. There will be no more drop-off at circulation desk; all new gifts must be reviewed by collection development staff.
- Revised browsing book procedure to facilitate more frequent browsing collection turnover, thereby increasing access and visibility of new materials.
- Collections Management Task Force recommended actions to result in increased space for collections. Projects to be carried out within the next 2-3 years.

Actions in progress

- NCDS staff is continuing to digitize video versions of Jones Collection films to CUL Digital Collections, primarily from the Tyler Collection.
- Loading of U.S. Serial Set MARC records into the catalog (~300,000 records).
- Relocation of the materials in G57.
- Created template and began cataloging of current holdings for Meadows School of the Arts recital recordings—an extensive collection not represented in the library catalog.
- Significant progress has been made in de-duping art history, theater and film book collections so that collections may continue to grow in Hamon Library’s severely limited space.
- Cataloging at the item level of the collections of Dallas Museum of Fine Arts exhibition catalogs in Bywaters Special Collections.

Goal 1 - CSF 5: Course reserves are delivered through a system that successfully addresses user needs.

Actions completed

- Variations system progressed from its pilot project status to a fully implemented system for access and study of reserve audio recordings.

Actions in progress

Goal 1 - CSF 6: Special collections materials and gifts are rapidly represented in the catalog upon their acquisition.

Actions completed

- Completed cataloging for 6 gift collections including the James M. Ward (Hamon) sound recording gift of 720 items and the Eric Steinfeldt gift (DG) of 929 maritime titles.
- Relocated and organized Wilson D. Snodgrass opera sound recording gift to expedite cataloging in process. Representation of Ward and Snodgrass collections in the library catalog will identify SMU's holdings of opera recordings as exceptional.
- The Scot Cantrell sound recordings bulk gift has been completed and new titles received will be cataloged on receipt.
- The archival documents of Robert T. Anderson were accepted by Hamon and DeGolyer staff for deposit in the archives. DeGolyer staff completed a finding aid in Summer 2010.

Actions in progress

- Cataloging of the formerly uncataloged DeGolyer maps is nearing completion. The estimated completion date is the end of the calendar year.

Goal 1 - CSF 7: CUL is included in all critical initiatives regarding SMU's expanded research agenda.

- Hamon staff members continue their involvement in the General Education Curriculum Committee.

Actions completed

Actions in progress

- Continued involvement in University Curriculum development.
- CUL has representation on QEP review committee.

Goal 2

Transform the tools of scholarly research by implementing strategic technologies that reflect the priorities of SMU while serving the broader scholarly community.

Goal 2 - CSF 1: Strategic technologies are progressively implemented.

Actions completed

- CONTENTdm System Upgrade to version 5.3.1
- ILLiad System Upgrade to version 8.0
- Voyager System Upgrade to version 7.2.1

- Streamlined tracking of electronic resource expenditures by proposing and implementing new electronic resource account numbers. These expenditures can now be identified and reported more efficiently in both Voyager Acquisitions and SMU Financials.
- Variations system progressed from its pilot project status to a fully implemented system for access and study of reserve audio recordings.
- KIC overhead scanner for easy public scanning has been installed and is heavily used at Hamon. The Provost Technology funds for this purchase were based on documented arts library patron requests and library staff needs.

Actions in progress

- CUL staff have embraced Dashboard wiki format for collaborative communications

Goal 2 - CSF 2: New technologies are thoroughly evaluated, selected, and implemented on a timely basis to support scholarly research and to make internal operations more efficient.

Actions completed

- SMU Libraries Systems “Roadmap” taskforce selected the Summon web discovery service which overlays the Libraries’ public catalog, digital image collections, subscription journals and databases, library research web guides, and more to provide to users a simple interface to access those disparate resources.

Actions in progress

- Work has begun to implement the ImageNow administrative imaging system to store and provide electronic access to contracts for CUL electronic resources.

Goal 2 - CSF 3: Technology evaluation, selection, and implementation are informed by and responsive to input from faculty and students.

Actions completed

- Insights gained from usability testing have been incorporated into the new website design, and into Voyager keyword field weights evaluation.
- CUL staff implemented change from QuestionPoint to LibAnswers on July 1, providing new functionality of SMS messaging. This allowed considerable cost savings and has allowed the development of a knowledge base more in line with support sites in users communities familiar to students today, even when CUL staff are not available to answer questions.

Actions in progress

Goal 2 - CSF 4: Documented processes guide the review of proposed and adopted technologies so that decisions about purchase, implementation, and retirement/replacement are made in a timely and systematic manner.

Actions completed

- Desktop computers replaced based on inventory and criteria which includes age of equipment, user need and availability of funds.

Actions in progress

Goal 2 - CSF 5: The evaluation and prioritization of digitization projects reflect the priorities of students and faculty for online access to collections, and are guided by established processes.

Actions completed

- CUL *Digital Collections Collection Development Policy and Procedures revised.*
- *SMU CONTENTdm Guide Framework for Building a Collection updated.*
- Digitization Guidelines & Procedures Best Practices for Digitization based on recognized standards updated and expanded

Actions in progress

- Copyright Process map drafted for approved by CUL management team.

Goal 3

Re-brand CUL as a powerful resource for the University community and increase awareness and use of collections and services.

Goal 3 - CSF 1: CUL is a catalyst to deepen and broaden the information fluency and technical literacy of its users.Actions completed

Actions in progress

- CUL staff expanding reach of user education to advanced classes in specific disciplines as well as to most sections of ENGL 1302.

Goal 3 - CSF 2: CUL enhances the quality of scholarship by providing the tools for skillful access, organization, and evaluation of information

Actions completed

- SMU Libraries Systems “Roadmap” taskforce selected the Summon web discovery service which overlays the Libraries’ public catalog, digital image collections, subscription journals and databases, library research web guides, and more to provide to users a simple interface to access those disparate resources.

- Launched new Ask a Librarian service, using the LibAnswers third party service, replacing OCLC's Question Point.
- Rebranded Research Guides website to better integrate it with the CUL website and with the Ask a Librarian website.
- CUL Electronic Resources Team adjusted team membership and roles in order to streamline acquisition, presentation and user access to subscription electronic resources.

Actions in progress

Goal 3 - CSF 3: CUL's web presence incorporates contemporary web design, is accessible to users with disabilities and provides efficient and easy-to-use access to collections and services.

Actions completed / in progress

- Adding new CUL website. All new website templates are built from the ground up with an eye towards usability and accessibility.
- All CUL website services are centralized and easy to locate
- Launched online faculty proxy request & proxy renewal service.

Goal 3 - CSF 4: CUL proactively reaches out to faculty, students, and others in the SMU community through a strong subject liaison program.

Actions completed

- Redesigned and improved the Online Resources web application. Subject librarians can now provide resource recommendations by each subject, and they can choose which Research Guide links to include in OR pages.
- The staff directory web application now supports the ability to quickly find and list subject specialists.
- CUL subject specialists attend faculty meetings, day and evening lectures, brownbags, dissertation defenses and social events in selected subject departments
- Hamon subject specialists continue to meet with Meadows chairs, new faculty, and constituents involved in new or changing programs so that their library needs may be better met.
- Director of SRRS met with Graduate Student Assembly to discuss grad student needs and services.

Goal 3 - CSF 5: CUL is actively involved with faculty and administration in curricular initiatives.

- Fort Burgwin Library was staffed by CUL librarian for the first Fall Term of SMU in Taos.
- Hamon continues to participate in the work of the General Education Committee.

Actions in progress

Goal 3 - CSF 6: CUL provides active and engaging programs that educate users and promote library resources and services to the SMU community.

- Subject specialists have contacted new faculty with information about services and offering support in information literacy initiative.

Actions in progress

Goal 3 - CSF 7: CUL programs, collections and resources are marketed and publicized to both internal and external constituents.

Actions completed

- CUL Electronic Resources Team published on CUL website the fall 2009 CUL Electronic Resources Newsletter to highlight new electronic resources added in the past year.
- CUL participated in Red & Blue Lunch, Resource Expo and Breakout sessions of all AARO sessions. Over 900 CUL information packets were distributed. CUL had similar booths during each Mustang Monday and Mustang Day event.
- FLC hosted group advising sessions during each AARO session. CUL staff escorted incoming students and parents from HTSC to FLC, allowing time for Q&A and an introduction to Fondren.

Goal 3 - CSF 8: All SMU departments work closely with the University Archivist to identify and preserve their records of historical value and to transfer them in a timely manner to the SMU Archives.

Actions completed

- CUL and SMU statistical reports for recent years are accessible to staff via shared drives and the public via university archives

Goal 4

Create comfortable, inviting and vibrant library spaces – both physical and virtual – that are responsive to the social dimensions of learning and research, that protect the discovery of knowledge, that allow for growth and that provide appropriate workspaces for staff.

Goal 4 - CSF 1: Building architecture, design, and collection arrangement enhance the user experience.

Actions completed

- Assistive Technology Center software is continually updated to serve the needs of students and others in the SMU community having learning and physical disabilities. CUL is in the process of replacing old monitors in the Assistive Technology Center (ATC) with larger, widescreen LCD monitors to aid low vision users of screen magnification software installed in the lab. CUL staff continue to partner with the Director of Services to Students with Disabilities office to provide in the lab additional software to aid students with learning disabilities. Starting spring semester 2010, we are offering Read & Write Gold, a text to speech literacy aid, and Ginger Premium, spelling and grammar checking software, both licensed by the Services to Students with Disabilities office.

Actions in progress

Goal 4 - CSF 2: Public spaces create an environment conducive to quality education, research and work.

Actions completed

- Hamon study rooms can now be booked online.
- Furniture in Hamon's extremely popular Hawn Conference Room was updated to include an improved AV lectern, modular conference table, and more comfortable wheeled chairs, all of which will increase the room's usability instruction and meeting space.
- Secured new durable, comfortable furniture for Fondren study spaces.

Actions in progress

Goal 4 - CSF 3: Staff workspaces are located to maximize workflow efficiency and to take advantage of existing strengths of CUL's physical facilities.

Actions completed

- **Actions in progress**

Goal 4 - CSF 4: CUL has full use of and access to all space within its various facilities

Actions completed

- Storage space in SIC basement used for gifts and duplicates was cleared out to provide space for DeGolyer special collections.

Actions in progress

- CUL has claimed ownership of SIC3; PTDS is in the process of moving into the newly renovated workspace

Goal 4 - CSF 5: Collections, especially the rarest and most valuable, are located in physical environments that support both access and preservation.

Actions completed

- Hawn Gallery and Bywaters Special Collections vault are monitored by electronic climate data loggers.

Actions in progress

Goal 4 - CSF 6: CUL provides a virtual environment where students and researchers can connect with one another and feel comfortable exploring and interacting with digital collections and services.

Actions completed

- CUL website provides options for patron input and interaction with library staff.
- Online study room booking application launched for the Hamon Library and the Fondren Library Center.
- Customized search screen for Library Catalog created for SMU-in-Taos Fort Burgwin Library.

Actions in progress

- Major redesign of CUL website with input from staff and usability testing in process.

Goal 5

Build on the high level of customer service provided by CUL and proactively address changing user behaviors and needs.

Goal 5 - CSF 1: CUL responds quickly to and better understands user needs and information-seeking behaviors, developing enhanced systems to assist users identify and use information.

Actions completed

- Subject specialists continue to develop and enhance online Research Guides, to direct virtual users to the best sources of information for their subjects.
- CUL Student Advisory Council provides feedback on collections and services.

Actions in progress

Goal 5 - CSF 2: Users report high levels of satisfaction with service and support.

Actions completed

- CUL conducts fall and spring user surveys to assess levels of satisfaction.
- CUL Student Advisory Council provides feedback on collections and services.

Actions in progress

Goal 5 CSF 3: User services are effectively marketed and publicized to internal and external constituents.

Actions completed

- Launched alumni library card request service (using online payment).
- Launched Colophon Collection of Moderns website.
- Launched Tables of Content reservation service (using online payment).
- User services and online resources are promoted during CUL events held throughout the year, including Welcome Tent, coffee break during finals, CUL cookout during National Library Week, and AARO.

Goal 5 - CSF 4: All staff go above and beyond the norm necessary to provide excellent customer service.

Actions completed

- Streamlined the ordering and receiving processes to expedite payment of invoices by increasing student staff for receiving and revising a collection development student position to include general technical services tasks.
- Centralized mail delivery and distribution for all of FLC.
- Hamon Circulation staff are updating procedures documentation and contact information to improve patron service in circumstances when a circulation supervisor is not immediately available.

Actions in progress

- Technical services staff worked with SRRS to streamline approval plan procedures.
- Acquisitions staff are working to provide book expenditure data to subject selectors with the goal of using this data to set budgets for each subject area.

Goal 5 - CSF 5: CUL contributes to the university's mission and spirit by encouraging innovation and responding creatively to new challenges with service improvements.

Actions completed

- ILL and Acquisitions staff developed and implemented procedures for filling select ILL requests by purchasing through amazon.com

Actions in progress

Goal 5 - CSF 6: The CUL website serves as an effective portal to library resources and is an important research tool for students, faculty, staff, and the wider SMU community.

Actions completed

- The online study room application has produced a sharp increase in Hamon website traffic, confirming the popularity of the service.

Actions in progress

- Hamon website continues to be updated to provide more effective access to service information, room booking tools, and the new LibAnswers system.

Goal 5 - CSF 7: CUL is a proactive partner with the Office of Student Affairs, expanding library involvement with Resident Life and Student Housing.

Actions completed

- CUL has a member serving on the University Conduct Board

Actions in progress

Goal 5 - CSF 8: Information literacy and library research skills are an integral part of every undergraduate's education.

Actions completed

- Information literacy components have been adopted as an integral part of the new University Curriculum, reflecting the efforts of the library representation on the General Education Review Committee

Actions in progress

Goal 6

Invest in the requisite talent and expertise needed for a preeminent research university library system by recruiting developing and retaining staff with the skills and knowledge required to provide leadership in a complex environment.

Goal 6 - CSF 1: Recruitment and employment processes enable CUL to attract highly qualified staff.

Actions completed

- PTDS has created a cataloging-centric internship program and recruited from local library schools
- Expanding advertising venues for position vacancies.

Actions in progress

Goal 6 - CSF 2: CUL follows established career advancement and management succession practices that support internal promotion and job growth.

Actions completed

- Several staff promoted during organization re-structuring

Actions in progress

- Preliminary discussions with HR and other campus departments to review possible career advancement models

Goal 6 - CSF 3: Staff and managers receive training and development opportunities that enable them to successfully meet job expectations.

Actions completed

- Initial revision of documentation for copy cataloging process completed.
- Numerous staff attended local, regional, and national conferences including ALA, ARL, NASIG, EDUCAUSE, CNI, ELUNA, Association for the Advancement of Sustainability in Higher Education, ACRL Assessment Conference, Texas Conference for Digital Libraries, Rare Books & Manuscripts Section (ACRL), Texas Music Libraries Association, Bibliographical Society, Texas Book Festival, Arkansas Book Fair, Austin Book Fair, Texas State Historical Association, Center for the Advancement and Study of Early Texas Art, Society of American Archivists, Open Access Symposium, History of Photography Symposium-UT Ransom Center, Daguerreian Society, Museum Computer Network, The Charleston Conference and AMIGOS.
- Staff attended various HR professional development workshops and IT training classes
- Training provided to student supervisors on hiring procedures
- Library Enrichment and Development Committee provided various professional development programs throughout the year.

Actions in progress

- After the Processing, Technology and Digital Services reorganization, all supervisors were asked to attend a series of SMU management classes.
- Planning for series of cataloging webinars on RDA
- After PTDS reorganization, training is being provided to allow additional staff to take on duties for electronic resources access troubleshooting.
- After PTDS reorganization, additional staffs with experience in cataloging are being trained to create metadata for digitization projects.
- Creating and updating documentation for all acquisitions procedures.

Goal 6 - CSF 4: Staff and managers report being satisfied with and engaged in the CUL organization.

Actions completed

Actions in progress

Goal 6 - CSF 5: Managers use the CUL performance management system to hold staff accountable for performance.

Actions completed

- All staff completed annual performance evaluations

Actions in progress

Goal 6 - CSF 6: CUL expands its range of required skill sets by hiring beyond traditional positions.

Actions completed

Actions in progress

Goal 7

Create a culture of open communication and collaboration, encourage and reward innovation, facilitate and empower staff initiatives, and streamline work processes

Goal 7 - CSF 1: Goals and priorities are communicated clearly to and understood by all staff and managers

Actions completed

- In October, CIP and LITDI merged to form a new department that reflects the library's current priorities and direction. Dean McCombs met with staff in the new department and sent an email to culnews announcing the merger and explaining how the change will help CUL reach its goals.
- Dean McCombs charged the IPTDI Task Force, led by Mary Queyrouze and Jennifer Kolmes, to develop several organizational models for how the new division will be organized, as well as a name for the new division, and to present them to EC by mid-December.
- Prior to submission of the model organization charts to EC on 12/15/09, Mary Queyrouze sent an update to staff in the newly merged department thanking them for their input and providing an update on the Task Force's activities.
- Pat Van Zandt met with a task force from SRRS to suggest changes to staff organization within that division, resulting in the new position of Assistant Director for Research Services.
- SRRS instituted monthly division meetings for communication and cooperation.

Actions in progress

- Acquisitions staff is preparing to deliver timely budget reports to subject specialists.
- Further suggestions of the SRRS task force on reorganization due to be implemented in the next fiscal year.
- Book budgets have been created. Selectors will receive monthly updates on spending.

Goal 7 - CSF 2: Established goals and priorities govern decisions regarding resource allocation

Actions completed

- The Financial Officer provides regular budget reports to CUL managers.
- Funding request has been submitted to Provost for additional funding for FY 2011.
- Three student projects were identified in October 2009 to speed the processing of gift collections and make existing collections easier to use. A special one-time funding was provided by Dean McCombs.
- Greater attention is given to all available funding sources and appropriate uses. A greater effort is made to fully utilize restricted funds and accounts.

Actions in progress

Goal 7 - CSF 3: The organization is structured effectively to align people and resources to support achievement of goals and priorities

Actions completed

- The merger of LITDI and CIP is already producing new opportunities for synergy and enhanced efficiency.

Actions in progress

- Staff with experience in traditional cataloging are applying their expertise to metadata creation.
- CUL is advertising for an Assistant Director of Research Services to oversee reference, instruction, and the subject liaison program.

Goal 7 - CSF 4: Collaboration, flexibility, innovation, and enhanced efficiency are promoted and rewarded.

Actions completed

- PTDS and ILL have implemented a pilot project in which certain categories of ILL requests are purchased online rather than borrowed through traditional ILL. The library has a basic timeline for statistical reports and reporting.
- PTDS has assumed additional responsibilities for supporting SRRS in managing the Browsing Book Collection. Acquisitions staff are ideally situated to spot suitable books as they arrive; skills needed for managing this collection are well represented among PTDS staff. Thus, both efficiency and public service are well served by this change.
- CUL staff have embraced Dashboard wikis as a format for collaborative communications
- Hamon, OIT and Meadows personnel collaborated to promote the Variations system from a pilot project to a fully implemented online music study resource.

Actions in progress

Goal 7 - CSF 5: Best practices from benchmark and other universities are adopted to improve work processes

Actions completed

- ILL has implemented best practices from the IDS Project Toolkit including: email templates added to ILLiad for a variety of situations to speed communications with patrons and lending libraries
- Purchase of equipment to give ILL its own UPS Worldship workstation eliminated transporting of trucks full of books to and from PTDS.
- Purchase of Bookeye scanner vastly improved speed, ease, and quality of scans of library materials for ILL.
- Changes in the approval plan resulted in subject liaisons regularly reviewing and selecting books received from YBP.

Actions in progress

- Use processes developed by VIVA to generate reports of e-resource usage statistics to inform collection development decisions.
- A task force has formed to examine statistical reporting practices and make recommendations on ways to streamline and enhance both collecting and reporting of this data. Part of this process involves examining requirements of external agencies and educating staff about those requirements. One anticipated outcome is that managers will have better data on which to base decisions. Comparison with benchmark organizations will be used to define “better.”
- A processing/cataloging work group has formed and is looking at ways to enhance efficiencies and reduce costs while maintaining excellent customer service.
- The IPTDI Merge Task Force reviewed many organizational charts from external libraries, including nearly all of SMU’s cohort and aspirant schools, in preparing their proposed models.

Goal 8

Develop a stronger financial base to acquire the raw materials of university research and met CUL programmatic goals through a vigorous and successful program of fundraising and development.

Goal 8 - CSF 1: Librarians receive competitive salaries and benefits based on regional and national standards.

Actions completed

Actions in progress

- Salary study is underway

Goal 8 - CSF 2: Salaries for non-librarian staff and students are competitive with those in other SMU divisions.

Actions completed

Actions in progress

- Salary study is underway

Goal 8 - CSF 3: Acquisitions funding is competitive with both area institutions and with research libraries nationwide.

Actions completed

Actions in progress

Goal 8 - CSF 4: Allocated funding is used efficiently to support CUL programs and initiatives.

Actions completed

- Cash Value of unused FirstSearch accounts was claimed and repurposed.
- Funding request has been submitted to Provost for additional funding for FY 2011.

Actions in progress

Goal 8 - CSF 5: A robust development and external relations unit focuses efforts on fundraising and development activities.

Actions completed

- A full-time DEA employee and staff assistant continue to raise funds for CUL.
- Successful solicitations have occurred with the Dean and Director of Development.
- The Director of Development has been incorporated in internal CUL operations including participating in the Dean's Leadership team.
- The Director of Development was included in the Users Group for the building renovation allowing for fundraising and programming discussion to occur simultaneously.
- Collaborated with CUL's Director of Marketing to produce annual report publication.
- Worked in partnership with both DEA and CUL to ensure success of the Faculty/Staff Division of the Unbridled Campaign; results produced the highest level of participation among CUL staff ever
- Secured grant monies received from foundations.
- Managed endowment reporting process to ensure donors receive updates on earnings and acquisitions.

Actions in progress

- Further refine portfolio
- Document donor activity
- Identify and qualify major donor prospects
- Expand CUL's donor base

- Secure six and seven-figure gifts
- Continue to access all DEA resources available including prospect management, corporate and foundation relations team, Telepony, and database control
- Managers from CUL, Hamon and the Jones Film and Video Collection met with the CUL Director of Development to renew funding and visibility efforts on behalf of the archive.

Goal 8 - CSF 6: CUL is well positioned to play a central role in SMU's Centennial Campaign and to achieve CUL's campaign goals.

Actions completed

- CUL's Director of Development is a member of the University's Principal Gifts Team and meets with all school and unit directors regularly to discuss fundraising strategy and donor prospects
- CUL's Campaign Steering Committee Co-chairs participate in the University-wide Campaign Executive Committee meetings twice a year to report on progress.
- DEA staff and the OVP for Development and External Affairs recognize CUL's funding priorities

Actions in progress

- Strengthen collaborative funding opportunities among schools and units and DEA
- Pending approval, the upcoming renovation project will be identified as a Centennial Capital Project
- Position the Archives of Women of the Southwest event (May 1, 2011) as a Centennial event
- University Archivist proposed endowment tied to Centennial Celebration

Goal 8 - CSF 7: CUL fundraising priorities are effectively marketed to SMU donors and prospects.

Actions completed

- A presentation was made to the National Major Giving Team by CUL's Director of Development to educate and provide information about CUL so when the fundraisers are in other cities they will be able to articulate the needs of the libraries as a possible funding area
- CUL's minimum requirement of \$100,000 to establish an acquisition endowment was added to the University's Endowment and Scholarship collateral
- Utilized University events such as Tate, Inside SMU and DAA for donor cultivation opportunities

Actions in progress

- A proposal has been made to the Denver Campaign Steering Committee to have the Dean and Director of Central University Libraries fly in and make a presentation to the group in the spring. Partner with other regional cities for events and speaking opportunities
- The Director of Development is meeting with the Director of Planned Giving to identify potential planned giving donors within the CUL constituency and within the University community as a whole
- Provide exceptional donor stewardship and oversight

Goal 8 - CSF 8: CUL's major campaign goals are funded e.g. the first phase of the renovation of the Fondren Library Center by 2013.

Actions completed

- Preliminary approval was granted in December 2009 by Dr. Turner for an \$8-\$10m renovation project.
- The building project will be positioned as CUL's funding priority although there are additional funding opportunities related to the campaign.
- Secured major gifts from both CUL's campaign steering committee co-chairs

Actions in progress

- Assessing scope of project.
- User group was formed.
- Further refine building renovations plans and create collateral material
- Identify naming opportunities