

CUL Strategic Plan Progress Report August 2015

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

Space

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 completed

- Done.

Complete Hamon lobby renovation project. Prepare for merging of print and AV circulation service points. Continue assessment of newly combined reference and circulation service desk and make refinements to training as necessary. (4.1, 4.2, 5.1, 5.4)

Actions completed

- Hamon lobby renovation project completed. In coordination with PDC Project Manager, all items on the renovation project punch list have been fully resolved.
- Former AV Center collection and service point relocated and merged with print circulation desk in the Hamon lobby. 13,000 CDs and DVDs transferred from the basement during spring break week in March with minimal disruption in service.
- Signage project team considered optimal placement of signage based on directional questions in Ask a Librarian stats and worked with signage vendor to complete installment of signage.
- Hamon access services and reference staff completed one full year of new combined services desk model. Assessment is regularly conducted to improve training. A set of FAQs used for training have been updated. halservices@smu.edu is used for communication among access services, reference, and student staff. The list is frequently used to reinforce training.

Continue Hamon Library space assessment currently underway and leverage opportunities to move low-use collections offsite. (4.1, 4.2, 4.3, 4.5)

Actions completed

- Offsite storage initiative on hold due to budget constraints and lack of financial support from University administration.
- Measurements of Hamon bound periodicals completed.

Actions in progress

- Consultation with shelving vendors resulted in proposals and quotes for installing additional shelving on the 2nd and 3rd floors so as to gain capacity over the next 5-10 years.
- Consultation with shelving vendors resulted in proposals and quotes for incorporating shelving in the Hamon basement to accommodate Hamon periodicals, Limited Access (former AV Center, B210), and Voices of Change Archive (former AV Study Room, B230).
- Former file room for Meadows School of the Arts, located off the 2nd floor landing of the stairwell, is being vacated by Meadows Office of Facilities. The deadline for removing all of the contents of the room has been delayed twice in the past year, however much progress was made over the summer months.
- Bywaters Special Collections staff and Hamon Director have met with a shelving vendor to develop plans for an arrangement of archival box shelving, book shelving and work areas once the 2nd floor room is ready for occupation.

In conjunction with the Hamon Arts Library 25th Anniversary, rebrand Hawn Gallery and the former Limited Access Collection area (Rm. 3250, 1250 SF) into venues that strengthen the library's connection with the curriculum of the Meadows School of the Arts. (3.5, 3.6)

Actions completed

- Exhibition Committee formed for Hawn Exhibition Gallery.
- Mission statement for the Gallery drafted.
- Early development of a Marketing Plan for the gallery.
- Input solicited from Meadows faculty through meetings and emails.
- Annual budget for coordinating a program of exhibitions was drafted. Grant funding considered and researched.

Actions in progress

- Identification of funding sources to hire a Curatorial Fellow (9 - 12 month term) to manage the program.
- No actions taken on redesigning Room 3210 in Hamon due to demands of the lobby renovation and upgrades to technology in Hamon study and meeting rooms. Focus Group planned for later Fall, 2015, to study possible uses of the room.

Implement space planning and renovation projects for the Fondren Library Center. (4.1, 4.2, 4.3)

Actions completed

- Numerous reports completed.
- Reclassed 4,788 Dewey items in FY 14-15.
- Withdrew 25,256 items in FY 14-15.

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- Completed 5,531 location changes in FY 14-15.

Actions in progress

- Redesign shelving and furniture layouts of specific floors and execute during the renovation.
- Renovation communication plan in progress.

Implement offsite storage. (4.4, 4.5)

Actions completed

- After contract negotiations with the University of North Texas for utilizing space in their repository, clarification of services offered, and lack of funding support from University administration, CUL made a decision to utilize on-site storage instead of off-site storage.
- The University assisted with funding for membership in CRL (Center for Research Libraries) which “acquires and preserves traditional and digital resources for research and teaching and makes them available to member institutions through interlibrary loan and electronic delivery” to support initiatives to reduce the collection footprint.

Actions in progress

- With no University financial support this initiative is on hold.

Evaluate and/or implement FLC projects outside the renovation (including but not limited to the ones listed below):

- Refresh the FLC 2nd floor link with new carpet and furniture.
- Repurpose the space reclaimed from the SMU Press for utilization by the DeGolyer Library.
- Refresh the FLE 323 classroom including carpet, furniture, projectors, speakers, and computer hardware.
- Relocate the first floor University classrooms to the renovated Information Commons. .
- Modify the FLE 322 space in order to open the area to the public for collections and new study space.

Actions completed

- FLC 2 link carpet and furniture is installed, complete.
- Refresh of FLE 323 classroom is complete.
- Modifications to FLE 322 are complete with shelving and the collections moved in with space for several study carrels.

Actions in progress

- Relocation of University classrooms will be completed with the renovation, though separately funded.

Services

Continue to examine the possibilities of further harmonizing Circulation policies across CUL. (1.4, 5.1)

Actions completed

- Hamon and Fondren have synchronized Voyager circulation policies, and replaced existing public web displays of circulation policy.
- Group composed of circulation managers at Fondren and Hamon created a matrix that demonstrated areas of alignment with regards to circulation policies at the two libraries. Where feasible, adjustments were made to circulation policies to increase alignment. The changes were provided to Technology Services so that they could be implemented in Voyager.
- Changes to the policies were updated on the CUL webpage. The Circulation Managers worked with the web team to make the policies easier to locate on the CUL webpage.
- Adjusted YBP profile on when to set OCLC holdings for shelf-ready materials, so that we no longer receive ILL requests for items that have not yet been received.

Actions in Progress

- Approved policies matrix to be implemented in Voyager.

Increase fill rate and improve turnaround time for interlibrary borrowing and lending operations. (1.4, 5.1)

Actions completed

- Adjusted YBP profile on when to set OCLC holdings for shelf-ready materials, so that we no longer receive ILL requests for items that have not yet been received.
- ILL staff have been working to improve fill rate and turnaround time for borrowing and lending through improvements in the workflow internally in ILLiad and also through assessment of external staff processes. This is an ongoing process.

Continue to increase access to Meadows' music recordings in legacy formats, including open reel tapes and cassette tapes, through development of a program of preservation and digitization. (1.3, 2.5)

Actions completed

- Division of Music Recordings assigned a "medium" priority on the Hamon Cataloging Projects spreadsheet updated 09/21/2015; original cataloging will be the responsibility of the Music Catalog/Metadata Librarian.

- Current response is to fill requests for legacy recordings, and archive the digital recording. New efforts have been made to promote the existence of the collection and the request process, including advertising the collection more prominently on the Hamon website and digital signage and linking to the request form on the Division of Music student recitals webpage.

Actions in progress

- The digitization process is ongoing. When the workflow for streaming audio is established by nCDS, a more robust effort can move forward.

Evaluate usage of Kanopy and Digital Campus streaming video services and investigate additional options for expanding streaming video content. (1.4, 2.1, 2.2)

Actions in progress

- Kanopy and Digital Campus administration was reassigned in light of staff changes. Services still need to be evaluated.

Develop and implement a plan for a combined Fondren Library Center service desk (circulation, reference, and IT) including adequate training, staffing, and referral system. (5.1, 5.4, 5.5)

Actions completed

- A Central Service Desk team implemented a combined service point on June 1, 2015. The reference desk was removed and all services moved to the lobby. The model combining reference and circulation services will continue to be adjusted throughout the academic year, especially as new spaces and new service points (IT Help Desk) are reinstated.
- Additional shared computers and peripheral equipment were deployed at the Central Service Desk.

Promote the use of Credo information literacy course modules for IL tagged courses. (5.3, 5.8)

Actions in progress

- Cutbacks in staffing and IT changes have impacted the ability to devote time and personnel to this effort.

Package content for distance students and online courses via website and BlackBoard. (3.7, 5.1)

Actions in progress

- Cutbacks in staffing in January 2015 impacted the ability to devote time and personnel to this effort.

Hire enough librarians to adequately serve all academic programs. (3.1, 3.4)

Actions completed

- Successful hire of Communication Arts Librarian, Hamon Arts Library.
- Redistribution of liaison assignments in Hamon to improve support to Communication Arts (Journalism, Advertising, Communication Studies) and other disciplines.
- Successful hire of Science and Engineering Librarian for Fondren.

In collaboration with campus stakeholders, assess the need for GIS, data management services, and digital scholarship support; establish and support needed services. (3.1, 3.2, 3.5)

Actions completed

- GIS position rewritten and filled; Map Library duties transferred to Map Cataloger and the Director of the Fondren Library and Head of Research Services.

Continue collaborations with CTLC Affinity Groups to build collaboration opportunities in the Digital Humanities and Public Services. (3.2)

Actions in progress

- Digital Collections Developer Librarian attended a Cross Timbers Library Collaborative Digital Humanities working group meeting at TCU with representatives from UNT, TCU, Tarleton State, Baylor, TWU, and SMU's Bridwell Library. The group provided updates, shared ideas, and provided collaborative feedback on a wide range of digital humanities topics and responded to questions from the members.

nCDS to develop and implement an information/directory/way finding touch technology solution (using equipment awarded by the Friends grant) in conjunction with SRRS. (5.1, 5.2, 5.3)

Actions completed

- Done

Continue to develop and refine the creation and implementation of digital exhibit technology and practices. (2.1, 5.5)

Actions in progress

- In process

Implement document delivery and/or paging services. (5)

Actions completed

- New document delivery service implemented in July 2015 for faculty, staff and graduate students.

Actions in progress

- A group from Bridwell, Hamon and Fondren are working on the procedures for the new paging service which will be implemented through Voyager and ILLiad. The new service will be implemented this fall semester.

Collections

In consultation with liaison librarians, develop a collection development policy that is aligned with curricular needs and the changing landscape of scholarly publishing. (1.1)

Action in progress

- On-going. Analysis of collections is underway.

Finalize weeding of print journals and monographs in preparation for renovation and offsite storage. (1.4, 4.1)

Actions completed

- Withdrew 25,256 items in FY 2014-2015.

Actions in progress

- Withdrew 3,359 items so far in FY 2015-2016.

Increase use of ShelfLister for improved inventory control, gathering unified data about misshelved items, damaged items, cataloging problems, etc. (1.4)...

Actions completed

- Starting Fall, 2014, ShelfLister has been successfully incorporated in the shelf management procedures in Hamon Library.

Actions in progress

- Database updates to fix cataloging problems identified by use of ShelfLister are current.

Develop policies and procedures for transfer of targeted collections to offsite storage and for patron access to such collections after they have been sent to storage. (1.3, 1.4)

Actions completed

- Offsite storage initiative on hold due to budget constraints and lack of financial support from University administration.

Complete weeding of the Hamon Arts Library Limited Access Collection and identify portions of the collection for offsite storage. (1.3, 1.4, 4.1)

Actions completed

- Weeding of regular and oversize monographs and scores is completed. Limited Access has been temporarily stored in the Jones vault since December, 2013, with reduced service. With weeding mostly complete, the next step is to plan for the transfer of the materials to the former AV Center in Hamon.
- Offsite storage initiative on hold due to no University financial support.
- Hamon Limited Access Collection has been measured against former AV Center in Hamon basement. Quotes have been requested for installation of shelving in the former AV Center in the next 4-6 months.
- All withdrawals and location changes resulting from the Hamon Limited Access project have been completed.

Actions in progress

- Weeding of Hamon Limited Access periodicals is in progress.

Complete revamp of public version of chart for gift collections awaiting cataloging in order to assist collection development staff decisions. (1.4, 1.6)

Actions completed

- Gift chart is up-to-date as of early Sept. 2015, and available on Inside.SMU.

Actions in progress

- Moratorium in place on accepting new gift collections during the renovation. Hamon Library has provided a newly prioritized list of Hamon gift and other special collections needing processing. Awaiting further prioritization for processing of gift collections by DeGolyer and Fondren Library collection development staff.

Continue with transition of management and oversight of Jones collection to special collections staff in Hamon. In conjunction with stakeholders, identify ongoing needs and seek funding opportunities. (1.4, 4.5, 7.3)

Actions completed

- Film Technician hired as 15-hour/week temp to continue on inventory and inspection/repair of the collection; one-year contract began in April, 2015.
- Jones Film & Video Collection team formed (Hamon Director, Head of BSC, Jones Film Technician) and initiated communication with Film & Media Arts Division faculty to develop long-range planning for the collection and respond to requests for curricular use of the collection. The team attended a faculty meeting, spring, 2015; met and provided a

two and a half hour tour of the Jones Collection for incoming Film & Media Arts Chair, summer, 2015.

Continue training and utilization of the RDA cataloging standards including response to the evolving status. (1.4, 6.3)

Actions completed

- RDA is the default standard used in original cataloging. RDA copy is accepted. RDA elements are added to records sent to Backstage for authority control processing.

Actions in progress

- The Cataloging Working Group is revisiting our RDA profile with Backstage to ensure the best options available are selected to enhance our records.

Plan for a future migration to a next generation library system to replace Voyager.

- Continue Data Cleanup Task Force work on cleanup projects and evaluation of new endeavors. (1.4)
- Continue the exploration of migration options allowed by the 2-year contract renewal of the Summon discovery product. (1.4)

Actions completed

- Small group of staff met with our new Ex Libris representative to discuss Alma development and pricing.

Actions in progress

- The Data Cleanup Task Force is reevaluating membership in light of vacant positions and the transition to Shared Services.
- Approval received from Automation Technology Steering Committee and the Council of Library Directors to obtain new pricing for the Alma system, to schedule on-site workflow analysis sessions with Ex Libris representatives, and to schedule visits to other local libraries to discuss their next generation library systems.

Expand scope of DDA (demand driven acquisitions) to include streaming video (Kanopy) and broaden to include vendors ebrary and EBL with EBL as preferred vendor. Promote DDA program and ebooks as part of a broader promotional campaign for e-resources. (1.1, 1.2, 3.7, 7.4)

Actions completed

- EBL set up as main DDA vendor; ebrary is used when titles are not available on EBL. EBSCO has been set up as a third DDA vendor. Titles are added manually in GOBI to the DDA pool for EBSCO (nothing comes automatically).
- Kanopy set up.

- EBL and ebrary are migrating to a shared platform in the winter or spring, 2015 (ProQuest Ebook Central). Bridwell and CUL staff are coordinating so that our change to the new platform happens simultaneously, if possible.

Continue efforts to expand content of the SMU Digital Repository in the following areas: Dedman School of Law student law journals, Tower Center conference proceedings and videos, Clements Center publications, and electronic theses and dissertations. Investigate the possibility of additional content such as Geothermal Lab publications.. (1.7, 2.2, 2.3, 2.4, 2.5, 3.2, 4.6)

Actions completed

- Added web form to improve submission process.
- Law journals: SMU Law Review, Vol. 67, Issue 4, was posted to the DR in January 2015. SMULR Vol. 68, Issues 1 & 2, should be posted by November 2015.
- Geothermal Lab: Investigated collection and discovered the contents consist of conference presentations without the necessary permissions to post to the DR.

Actions in progress

- Had communication in Fall 2015 with Underwood Law Library staff about collaboration to add the SMU Law Review archive to the DR. Meeting with Underwood Law Library staff in Oct. 2015 to discuss collaboration to recruit content from SMU law faculty to DR. In Summer 2015 two other journals expressed interest to move to the repository platform: Journal of Air Law and Commerce, and the Law and Business Review of the Americas.
- Tower Center: In future, possibility of starting work on new Tower Center Scholars collection (UG research), under direction of Tower Center Senior Fellow.

Complete implementation of the Electronic Resources Management system (ERM) (including entry of contract information) to enhance management of electronic resources and better understand electronic usage. (1.1)

Actions completed

- All areas but contracts are complete.

Actions in progress

- Sarah Haight Sanabria and Heather Barrett received training on licensing and are entering contracts into the ERM, using the previously agreed-upon list representing ~80% of licensed content.

Implement recommendations of the Hamon Arts Library Music Special Collections Task Force Final Report as staffing capacity allows. (1.3, 4.5, 7.3)

Actions completed

- The Task Force recommended immediate intervention of the 900 VoC recordings and a group of audio recordings in Bywaters Special Collections. Quotes were requested from two digitization vendors and a final contract (PO) is completed. The recordings are being prepared (inventoried, preliminary metadata supplied) to ship to the vendor for digitization by the end of October, 2015.
- The Task Force submitted and received a Friends Colophon Grant to bring in a Music Archivist to consult on processing the Voices of Change collection, which was recommended as high priority by the group. The final report of the consultant was received on September 22, 2015. The report outlines standards for description and access, space and preservation requirements, and different approaches for implementing the standards.
- A quote for shelving for collection storage has been requested.

Actions in progress

- The Task Force will regroup in Fall 2015 to consider the recommendations of the consultant's report for the Voices of Change Collection.

Continue to evaluate concert recordings of the Meadows School and Voices of Change in obsolete formats in order to identify the most pressing needs for intervention. Work with nCDS to prioritize the digitization of concert recordings from the Meadows School of the Arts. (1.3, 4.5)

Actions completed

- An inventory of the entire SMU concert recordings and VoC Collection recordings was completed in 2013 by a consultant from MediaPreserve. The most degraded recordings were digitized using a Friends of the Library Grant, completed in late Fall, 2014.

Actions in progress

- The subset of the entire inventory of audio recordings that were digitized last fall are intended to become a pilot project for introducing a workflow for streaming audio of Meadows content in ContentDM.
- nCDS technical processes in progress.

Continue with proof of concept project with nCDS for loading a set of recently curated and professionally digitized Meadows records (MSO and Voices of Change) into ContentDM. Leverage the small curated collection into grant funding opportunities aimed at addressing the larger need for processing and preservation of these legacy collections. (4.5, 8.7)

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Actions completed

- Funding identified to complete digital preservation of Meadows and Voices of Change recordings.

Actions in progress

- With recent hire of Digital Production Librarian in nCDS, the expectation is that the project will see progress in the coming year.

[Remove a group of recently identified nitrate films from the vault of the Jones Film and Video Collection in Hamon Arts Library and rehouse at an appropriate institution. \(4.5\)](#)

Actions completed

- No actions taken.

Actions in progress

- No actions completed.

Financial

[Continue to raise funds to support priorities. \(8.5\)](#)

Actions completed

- Received FY2016 TexTreasuries grant for \$25,000 to digitize 1,317 items from the DeGolyer Library's George W. Cook Dallas/Texas Image Collection.
- Additional gifts, both restricted and unrestricted have been received in support of the renovation, AWSW and operations.
- Over \$50k has been secured for the Moser Furniture project in the Centennial Reading Room.
- Received additional funding (approximately \$500K+) from the President of SMU. Commitment to support additional refresh projects in the renovation.

Actions in progress

- Market tables in chairs in Centennial Reading Room.
- Continue to solicit major gifts for remaining opportunities.
- Finalize renovation naming opportunities and secure gifts for remaining spaces.
- Partnering with National Major Giving Team to identify regional prospects for CUL.

[Expand CUL donor base by 25%. \(8.5, 8.7\)](#)

Actions completed

- Incorporated alumni portal donors in CUL database for marketing and solicitation purposes.

- Obtained a commitments summary report for FY 15 detailing commitments, cash and constituent type for benchmarking.

Actions in progress

- DEA's prospect research team continues to identify prospects for CUL.
- Working toward 100% participation goal for Library Executive Board overall campaign giving (currently at 99%).
- Continue to identify and secure gifts for CUL funding priorities.

Outreach

Provide training and support for liaisons on open access, copyright, and other trends in scholarly communication; best practices for supporting faculty grant funding applications; and best practices for supporting digital scholarship and data management/curation. (3.4)

Actions completed

- Liaisons attended the ACRL scholarly communication conference "Scholarly Communication: From Understanding to Engagement" at Baylor University in May 2014.
- Humanities Research Librarian conducted training for liaisons during monthly meeting in fall 2014.

Continue to promote services of the liaison librarians to faculty and students through strategic outreach and marketing efforts. (3.4, 5.3)

Actions completed

- Liaisons market services, information literacy sessions, workshops, and resources through e-newsletters to their departments, regular communication with faculty, This Week @ the Library, digital signage and flyers at events such as the Welcome Tent, AARO, Library Open House, and at service points.

Actions in progress

- Support & training for liaison newsletters is ongoing; support for other efforts is available.

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

Actions completed

- ALEC – Currently teaching library instruction for ALEC course (HDEV 1110) and assisting with ALEC Research workshops. Development of relationships with the ALEC has led to cross-promotion of services and workshops in the ALEC and libraries, leading

to point-of-need marketing of services (i.e. Promoting ALEC Time-Management workshops at CUL Plagiarism Workshops).

- Residential Commons – Currently establishing the RC Librarian program where a librarian will serve as the libraries' representative to a residential commons. Librarian will serve as primary contact for Faculty-in-Residence and Peer Academic Library to promote library services for residents.

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

Actions completed

- Digital kiosk installed in FLC Link.

Actions in progress

- Consistently using Twitter to communicate CUL news and events.

Continue redesigning and upgrading all the CUL websites, adding and improving services, and reorganizing content, with responsive design being top priority. (3.3, 5.6)

Actions completed

- Hamon website reorganized and redesigned to take advantage of responsive design functionality in February 2014.
- Fondren/CUL redesigned in August 2014.
- SMU Archives website redesigned in March 2015.
- DeGolyer website redesigned July 2015.
- Responsive Design adjustment to mobile study rooms app, September 2015.
- LibGuides 2.0 redesign, August 2015.
- LibGuides 2.0 migration resulted in a cleanup of old Research Guides content, new Research Help web page, and creation of new reusable content.
- Redesigned and improved content of faculty services web page.
- Added "Best Bets" to Discovery searches to improve connection of search with relevant content and to connect searches with relevant Research Guides.

Actions in progress

- Refresh of SMU skin on Library Catalog in process.
- Revamp / merging of Fondren and Hamon Circulation Policy webpages in progress.

Test and offer virtual desktop access to several major campus systems (including Voyager) (in partnership with OIT) in order to streamline procedures and provide access to systems remotely during renovation or disaster recovery. (2.2, 2.4)

Actions completed

- Spring/summer cataloging intern successfully used Voyager on apps.smu to complete work assignments.
- OCLC's Connexion app has been updated to the current version.

Actions in progress

- Apps.smu.edu administrators have agreed to test installing several Gary Strawn tools for use with Voyager in a virtual 32-bit environment in order to preserve access to the programs regardless of 64-bit OS changes.

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

Actions in progress

- Continue to hold tours of nCDS and CUL Digital Collections to community members, prospective donors, and library colleagues.
- The Friends group continues to partner with other community and campus organizations to bring authors and other speakers to campus.

Market and track the success of the alumni portal to provide access to selected new electronic resources in partnership with Alumni Relations. (5.6)

Actions completed

- \$5,395.00 was brought in through alumni portal fees in FY15. That's a total of 154 alumni participating in the program compared to 150 in FY14.

Actions in progress

- Continue to promote the program; perhaps do an article highlighting the service to alums.

Continue the work of the Marketing Advisory Group in order to standardize the professional image of CUL and to provide marketing support for CUL. (3.7)

Actions in progress

- Support and standardization of marketing practices is ongoing.

Develop a comprehensive communication plan for the CUL renovation project and effectively communicate plans and updates to all CUL constituents. (4.)

Actions completed

- Several lines of communications have been developed.

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- A 12-point communication plan has been implemented, allowing for customization as the needs of the project change.

Actions in progress

- We continue to assess and tweak renovation communications. Website, blog, boards, displays, and email communications are used and continually updated to alert staff and patrons.

Solicit user feedback through social media about library services, collections, and facilities. (1.2)

Actions in progress

- Work continues on Facebook, Twitter and Instagram although feedback has been rare.

The newly-formed Campus Engagement Committee develops and implements consistent campus engagement opportunities. (3.6, 3.7)

Actions completed

- The Campus Engagement Committee connected key personnel within the library to create an annual calendar of very successful events that target specific populations in specific areas: social, cultural, creative, scholarly, and service. These include: AARO, Welcome Tent, Library Open House, Little Free Library, Banned Book Readout, Family Weekend tent, Homecoming float and giveaways, scholarly workshops, Games in the Commons, therapy dogs & pig, Teacher Appreciation Week feedback event, Town Hall meetings, and finals week coffee breaks.

Actions in progress

- Campus engagement events are ongoing and continue to be implemented by members of the Campus Engagement Committee.

Prepare for the launch of the Hamon Arts Library's 25th Anniversary in late 2015 / early 2016. Develop events aimed at maximizing publicity. (3.6, 3.7, 8.7)

Actions completed

- Hamon Library 25th anniversary event on September 23, 2015, planned as one of the auxiliary events for the SMU Centennial Homecoming weekend.
- Exhibition, *Fashion Design Sketches by Nancy B. Hamon*, on display in the Hawn Exhibition Gallery, September 24-December 13, 2015.
- Exhibition *Paper Dolls by Justin and Colleen Schull* on display in the newly renovated Hamon lobby, September 24-December 13, 2015, funded through a Friends of the Library Colophon Grant.

- Widely posted Mustang Minute video showcasing the history and collections of Hamon, as well as new directions in space planning. Video featured testimonials from Deans (Meadows and CUL), students, and Hamon staff.
- Plaque hung in Hamon lobby recognizing donor Ann Folz for funding new furnishings in the lobby and throughout the library.
- Meadows School of the Arts chose Hamon Library to host their Centennial Open House for alums (showcasing the new lobby and the new exhibitions).

Culture/Staffing

Provide targeted staff training and development opportunities. (6.3)

- Assistant Deans to assess and implement specific training needs for each division. (6.3)

Actions in progress

- Assistant Deans and Directors solicit input from staff and supervisors and send staff members to training, conferences, and webinars appropriate to their positions and professional development needs as budgeted funds are available.
- Provide archival matting training to staff across CUL. (6.3)

Actions completed

- Bywaters Special Collections Curator provided archival matting training which was attended by several staff members.
- Re-convene the Student Employment Committee and implement improvements to student hiring, training, and expectations as required.

Actions completed

- Student Employment Committee convened late summer 2015.
- Develop expanded orientation procedures for new hires to include checklists and mentoring for new employees.

Actions completed

- Done. New checklist developed for new hires completed; mentoring for new employees started spring 2015.
- Support management development opportunities for supervisors by offering a discussion forum for managers.

Actions in progress

- Not yet completed

- Continue to support managers to complete at least two or more courses in HR Manager Orientation program.

Actions completed

- Completed

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

Actions completed

- All staff vacancies reviewed before decision to fill positions are finalized.
- Several vacant positions were reviewed by Technology Services supervisors and recommendations made to CUL Management Team to hire staff members for digital production, bindery, receiving/end processing, and batch record loading and documentation. In addition, approval was given to fill a vacant position with a temporary librarian to handle music gift collections cataloging and projects.

Respond proactively to recommendations made by the OE2C initiatives. (7.3, 7.4, 7.5)

Actions completed

- Staffing changes and reductions implemented. Assessment of implications regarding Shared Services and staff reductions continue.

- **Eliminated Positions**

Librarian 3	Reference/Maps Librarian
Library Specialist 4	ILL
Library Specialist 5	ISEM
Library Specialist 4	ILL
Librarian 3	Bibliographic Services & Metadata Cataloging Librarian
Assistant Dean	SRRS
Librarian 3	Head of Collection Development
Shared Services	
Director 2	Director of Finance & Special Projects
Coordinator 2	Facilities Manager
Technical Team Lead	Application Efficiency, Web Development and Database Administrator
Web Developer	Web Programmer
Web Developer 1	Graphic Designer and Marketing Support
Desktop Support Consultant/Associate - TS	
Desktop Support Specialist/Consultant - TS	

- Streamlined reporting structure in Technology Services to reduce layers.
- Continued to evaluate and implement outsourcing options when feasible.
- CUL has lost 20% of its staff over 2 years due to University budget cuts and OE2C organizational redesign's reallocation of staff to Shared Services.

Actions in progress

- Reorganization of CUL in light of positions moved to SMU Shared Services is in progress.
- Most OE2C initiatives have been implemented, including reorganization, procurement, contracts, and shared services. Some are in very early stages. The financial success of these initiatives is still unknown.

Enhance internal and external customer service. (5.4)

Actions completed

- Combined reference and circulation service points in the lobby to improve customer service.
- Implemented document delivery for faculty, staff and graduate students.
- Offering an array of workshops for students, faculty and staff.
- Improving ILL workflows to decrease ILL turnaround time.
- Hired Science Librarian to improve research collections and information literacy for the College of Engineering and Computer Science.
- Improved communication between Circulation, ILL, and Research Services through more communication and combined work environment at the desk.

Develop and maintain a culture of open communications and foster a culture of civility within the CUL work environment. (7.1)

Actions completed

- During OC2C, CUL management team members communicated as much information as possible throughout the process.
- Managers emphasized civility during staff meetings with supervisors during a very stressful time period at SMU.

Actions in progress

- This is a continuous process.

Provide opportunities for staff involvement in renovation planning. (7.1, 7.3)

Actions completed

- At the conclusion of the planning phase, the original renovation user groups were disbanded with thanks from the Dean. Smaller staff working groups have been formed to address specific aspects of the renovation.

Actions in progress

- Staff working teams will continue to be formed as needed. Groups include a weekly meeting of key staff and a weekly meeting of SMU Office of Facilities Planning and Management, which includes CUL staff. Initially there were two CUL co-leaders for the project which was changed to 1 CUL project leader.

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

Actions in progress

- Early funding for equity increases was provided, but recent requests for additional funding have been denied.

Fill CUL positions as needed. (6.1, 6.2)

Actions completed

- Done. All vacancies reviewed by Management Team and decisions to fill, hold, or reconfigure are made. This is a standard practice. 9 positions filled from September 2014 to August 2015. 7 positions were eliminated due to OE2C and 7 other positions were moved to Shared Services

Assessment

Foster a culture of assessment within the library. (7.3, 7.4, 7.5)

- Support departments in developing their data recording and reporting processes. (7.3, 7.5)
- Support departments in building cross-departmental data sharing and accessibility. (2.1, 7.5)

Actions completed

- Created a new Library Instruction data entry form on Inside.SMU to streamline librarians' logging of their instruction sessions in and to capture session characteristics for decision-making as well as to enable participation in the GWLA research study aiming to connect Library Instruction with Student Success Outcomes.
- Created new Research Consultation data entry form on Inside.SMU to enable librarians to record a broader set of consultation sessions, including solo hours of work spent on faculty support.

- Created a new Outreach data entry form on Inside.SMU after consulting with marketing and outreach staff from different public service areas representing all of CUL, and incorporating suggested activity categories offered by the User Experience Librarian.
- Created a stats webpage to establish a single access point for all of these forms that librarians need to find and fill out on a regular basis, as requested.
- Created space on Inside.SMU to upload collection stats by Tech Services and other cataloging staff members.
- Created VBA code for Excel to automate the compilation of all monthly collection stats documents loaded onto Inside.SMU. This does not replace the manual review and compilation of stats, but serves as an extra check to increase the accuracy of reported results.
- Created a prototype analytics interface for CUL using the institutional IBM Cognos license. Initial data entered into the analytics engine include reference and circulation transactions, FLC patron counts, FLC printer usage, study room reservations, and library instruction and research consultation sessions.
- Obtained for CUL Assessment Director network usage reports for public computers for the purpose of assessing, in conjunction with manual walk-through counts, high and low volume usage times.
- Obtained public printer activity reports for the CUL Assessment Director to aid in the study of building service activity.

Actions in progress

- Work with librarians to explore the details of merging Reference transaction logging and Research Consultation logging into a single Research and Reference Consultation form, which will more broadly enable the capture all significant librarian activity, especially in support of faculty, as well as all central service desk transactions. Explore the possibility of making the necessary customizations in the upgraded RefAnalytics 2.0, and the possibility of including DeGolyer-specific options and verbiage, streamlined in such a way to encourage detailed comprehensive reporting of all reference consultations.
- Work with DeGolyer staff to create a circulation management system or software application that desk students and staff can use to link researcher demographics (i.e. faculty, student, etc), with the specific requests they make, for a more robust accounting of DeGolyer activity.
- Move the CUL Cognos analytics interface from the test server to the production server and request 10 initial logins for CUL managers and decision-makers, to make this data accessible more broadly.
- Requested updates of the public computer network usage report from OIT Client Services, to be provided twice yearly.
- Continued with ongoing survey to determine outcomes of CUL Digital Collections; produced findings in CUL Digital Collections: Making a Difference, Volume 2, 2015.
- Subscription to OCLC's WorldShare Collection Evaluation to be used to assess CUL collections, especially as compared to various benchmarks and peer groups.

Develop an assessment plan and a robust data collection and assessment program. (7.5)

- Identify and track desirable and measurable metrics for each department and CUL as a whole. (3.6, 3.7, 7.5)
- Identify industry-established survey instruments and tools for tracking desirable metrics, and/or develop local solutions. (3.6, 3.7, 7.5)
- Establish real-time data reporting to enable process improvements and to enable marketing of strengths and improvements to users. (3.6, 3.7, 7.5)

Actions completed

- CUL Assessment Committee identified desirable metrics for each department and created a comprehensive list of assessment plan elements to help guide and prioritize the selection of measurable metrics to include in the Assessment Plan.
- CUL Assessment Committee added 4 new members, and set a timeline to complete the inaugural CUL Assessment Plan by the end of Fall Semester 2015. Significant areas of data collection and assessment have been determined, and members of the committee have been assigned as point-persons to each area. The draft of the eventual plan has been created.

Actions in progress

- CUL Assessment Committee to finish creating a CUL Assessment Plan. Identify relevant metrics in each area, establish the target goals of satisfactory completion for those metrics, and ensure that there are sustainable methods of measure those metrics ongoing.
- Some local solutions have been developed for tracking some new and desirable metrics (such as measures of librarians' support of faculty), but they have not yet been implemented. Industry-established survey instruments have been identified, but not yet implemented.
- Request for purchase of real-time network-capable people counter devices has been delayed and may need to be revisited. A follow-up report and revised request will be submitted to leadership by the CUL Assessment Director in January 2016.
- CUL analytics interface (Cognos) currently populated with data from 2012 through Spring 2015 as an initial static database. Next steps toward real-time data reporting will be establishing a monthly data upload process, and establishing data partnerships with security, etc, to obtain real-time data for card-swipe entries, etc.

Promote and support CUL's role in institutional effectiveness and institutional assessment. (1.7, 5.8)

- Promote and support CUL's role in advancing institutional buy-in for COGNOS. (2.1, 2.2)

Actions completed

- CUL is the first entity at SMU to ever request database architecting permissions for COGNOS. The request was approved; security permissions and login account were created for CUL Director of Assessment.
- IRB approval was granted by SMU and secure storage space was granted by SMU for the GWLA Student Learning Research Project (administered by Director of Assessment). An SMU statistician was hired by GWLA as the statistician / data analyst for a 6-year longitudinal study of the effect of library instruction upon various student success outcomes and institutional effectiveness indicators such as retention and graduation rates. Participation includes 20 GWLA institutions.

Actions in progress

- Explore cross-campus data partnerships with Institutional Research or Accreditation to determine the extent to which institutional data can be merged with library data.
- GWLA project underway, with first year of library instruction data submitted, and first year of institutional student outcome data being requested in October 2015. First year results expected in Spring 2016, with subsequent years of data collection ongoing.
- CUL Director of Assessment assigned to SACS 5-year report committee as one of the editors of the final document.