

**J. Edgar & Louise S. Monroe Library  
Annual Report 2003-2004**

**1. Executive Summary**

*1.1. J. Edgar and Louise S. Monroe Library Annual Report, 2003-04*

1.2. The Monroe Library serves the teaching, learning, and research needs of the entire university, with special emphasis on the needs of students and faculty in the College of Arts and Science, the College of Business Administration, the College of Music, and City College.

1.3. A major assessment tool for the library is the annual LibQUAL survey, which the library conducted in 2003, 2004, and plans to conduct again in 2005. LibQUAL is a suite of services that libraries use to solicit, track, understand, and act upon users' opinions of service quality. The library also collects user feedback that supplements or elucidates the LibQUAL survey in a number of ways, including surveys and discussions focused on specialized services or the needs of different client groups.

1.4. The top four strategic goals to be accomplished in 2004-05 are

- \* Work closely with the Center for Information Literacy advisory board to plan for faculty development and the integration of information literacy into the curriculum and campus programs.

- \* Implement and evaluate the new library web page design, which provides organization for and access to the virtual library.

- \* Make significant progress on fund raising for the National Endowment for the Humanities Challenge Grant to establish the Center for the Study of Catholics in the South.

- \* Complete a comprehensive program review for information resources.

1.5. For a review of past and current budgets, see section 5 below.

1.6. The library's major budgetary challenge is that its operating budgets have been largely stagnant over the last ten years, and there seems to be no mechanism at the university for planning for inflationary increases in the cost of information resources or for anticipating and funding new operating or staffing needs. We hope that the new two-year budget planning cycle will remedy this problem.

1.7. In internal surveys such as the Student Exit Survey and in external sources such as the Princeton Review, the Monroe Library continues to be cited for its excellent services and resources. In 2003-04 the library sought to fulfill its goal to be a model of what academic libraries are and will become by establishing the Center for Information Literacy, enhancing the Information Commons, creating a Professional Development

Plan and winning an award to fund it, introducing videoconferencing and virtual reference to campus, and providing leadership for upgrading campus classrooms. Though not without its challenges, 2003-04 was a very successful year.

## **2. J. Edgar and Louise S. Monroe Library**

### **2.1 Vision for the J. Edgar and Louise S. Monroe Library**

The library is a center for enhancing skills that are necessary for success in college and in life-long learning. Students build information literacy and critical thinking skills throughout their careers at Loyola through the collaborative efforts of their professors and the library faculty and staff.

The library building is a technologically-advanced, inviting and welcoming place for the entire Loyola community. Everything the library has to offer, its building, collections, services, faculty, and staff, is recognized as a key component in recruiting and retaining students.

The library is user-centered, always seeking to understand the needs of its primary clients, the students and faculty, and making decisions based on those needs. The library is the campus center for instruction in the use of technology in teaching and research.

The library values the contributions and excellence of its faculty, staff, and student workers. The library is a learning organization, characterized by people who are continuously developing new skills and greater expertise.

Work in the library is marked by collaboration: among students, among students and faculty, and among faculty. Library faculty and staff work together and in partnership with people and organizations outside the library. The collaborative relationships formed by library faculty and staff benefit the whole university.

The library strives to be a model of what academic libraries are and will become. The library, as an organization, encourages creative thinking and actively seeks to serve as a test bed for new ways of delivering information and new methods of teaching and learning. As a result, the library provides the highest quality learning tools and information content to enhance the educational experience for faculty and students.

Approved by the Library Steering Group, 8/28/01

2.2. The Monroe Library serves the teaching, learning, and research needs of the entire university, with special emphasis on the needs of students and faculty in the College of Arts and Science, the College of Business Administration, the College of Music, and City College.

2.2.1. See attached Human Resources Report, appendix A

2.2.2. See attached Human Resources Report, appendix B

### **3. Assessment**

3.1. A major assessment tool for the library is the annual LibQUAL survey, which the library conducted in 2003, 2004, and plans to conduct again in 2005. LibQUAL is a suite of services that libraries use to solicit, track, understand, and act upon users' opinions of service quality. It is sponsored by the Association of Research Libraries. The program's centerpiece is a rigorously tested Web-based survey bundled with training that helps libraries assess and improve library services, change organizational culture, and market the library. In addition, LibQUAL provides the library with comparable assessment information from peer institutions.

The library also collects user feedback that supplements or elucidates the LibQUAL survey in a number of ways, for example, general faculty surveys. The last comprehensive general faculty survey was conducted in 2002. The library conducts faculty surveys on specific issues, such as the use of technology in the classroom (fall 2004) and the need for classroom facility enhancements (Spring 2002). Library instructors also ask participants in workshops and other instructional sessions to fill out evaluation forms. In addition, faculty provide feedback to the library through the University Library Committee and through the faculty who serve as departmental or college liaisons to the library.

Student feedback to the library is provided through LibQUAL, through the Student Library Advisory Committee, through meetings with the president and vice-president of the Student Government Association, and through the library's suggestion box. The library also seeks student feedback on specific issues, such as the usability of the library web site. The library conducted extensive usability studies with students for the revised web site that was introduced in October 2004.

Historically, the library has collected annual statistics on library services and information resources and continues to do so. Statistics such as the number of people entering the building, number of times books and other materials are checked out, number of book and bound periodical volumes added to the collection, number of electronic books made available, etc. help the library gauge its resources and use over time. See Appendix C.

The library also compares these and other statistics to those of peer group institutions. The library collected statistical information from a subset of the university's reference group in 2001-02 and will periodically update this information. The library also belongs to the Affinity Group, composed of libraries at fifteen private, selective to highly selective, comprehensive universities that have committed to sharing statistics and other information annually. The libraries from other Jesuit colleges and universities share statistics on an annual basis.

In the past year the library has undertaken a major revision of its strategic plan, based on work done in a library planning meeting. In the meeting, all library faculty and staff participated in a discussion of where the library was in 1992, where it was in 2002, and where we hoped it would be in 2012 (the university's centennial celebration). This discussion, as we looked to the future, amounted to an environmental scan. The library also used OCLC's environmental scan for 2003 to kick off discussion at the August 2004 library planning meeting and to inform members of the Library Visiting Committee about the changing environment in which the library exists.

3.2 – 3.3. The library's strategic goals for 2003-04 included:

\* Increase the operating budget to \$1,420,000.

The purpose of this increase was to maintain the library's current resources and allow it to make strategic investment in new resources, for example, full-text databases. Unfortunately, the library's operating budget remained at its 02-03 levels.

\* Work with Human Resources to develop a recommendation for upgrading staff positions.

HR's consultant recommended the upgrade of 13 staff positions in the library, requiring approximately \$9,000. The money has not been provided by the university, and the upgrades have not been made.

\* Create and implement a library faculty and staff development plan.

Done

\* Create and implement a plan for student worker development and recognition.

Done, though further refinement is needed.

\* Explore and implement new ways of accomplishing technical services work, including outsourcing.

Done

\* Develop and implement a fund raising plan with specific goals and strategies.

Done. Ongoing updating and monitoring are needed.

\* Provide leadership to plan and implement instructional technology upgrades in campus classrooms.

Done, to the extent the library can influence and support this effort. The university needs to identify annual funds for classroom enhancement.

\* Implement a wireless network in the library.

Done. This was accomplished through the Information Technology Department.

\* Promote the ILLiad service to faculty and students. (ILLiad allows faculty and students to order materials electronically through Interlibrary Loan.)

Done

- \* Implement videoconferencing in the Monroe Library.  
Done
- \* Move the music library resources and staff into the Monroe Library and reconfigure the library's first floor to enhance the Information Commons.  
Done
- \* Provide leadership and support for a faculty center.  
Done. The library continues to support this goal through the Center for Information Literacy.
- \* Develop a plan for implementing information literacy on campus.  
Done. The library is working with FYE programs in the colleges.
- \* Implement a virtual reference service.  
Done. The library shared a service with the University of Southeastern Louisiana in 03-04 and will share a service with libraries at other Jesuit institutions in 04-05.
- \* Improve access to electronic resources.  
Done, through the implementation of SFX and Metalib.

3.4. See 3.1.

#### **4. Planning**

4.1. The library has a three-year strategic plan that is reviewed and updated on an annual basis. The most recent planning cycle has resulted in a plan for 2004-07.

4.2. – 4.4. The top four strategic goals to be accomplished in 2004-05 are

- \* Work closely with the Center for Information Literacy advisory board to plan for faculty development and the integration of information literacy into the curriculum and campus programs.

Expected outcomes:

Information literacy will be fully integrated into the first year experience program in all disciplines.

Library instruction will see a dramatic shift to more advanced, assignment specific class sessions.

- \* Implement and evaluate the new library web page design, which provides organization for and access to the virtual library.

Expected outcome:

Faculty and students will indicate on the LibQUAL survey that the library's web site supports their work as independent library users.

\* Make significant progress on fund raising for the National Endowment for the Humanities Challenge Grant to establish the Center for the Study of Catholics in the South.

Expected outcomes:

A minimum of \$332,000 will be raised to match federal funds.  
The university will make significant progress on identifying and cultivating potential donors to complete the challenge grant.

\* Complete a comprehensive program review for information resources.

Expected outcomes:

The library will develop and implement reliable planning and assessment methods for information resources.  
The library's information resources will better meet student and faculty needs and will be rated more highly on LibQUAL surveys.

## **5. Budget**

5.1 FY 03-04 budget. See attached Business and Finance Report, appendix D.

5.1.1. The Business and Finance Report indicates that \$4,780 was left in the library's budgets at the end of FY 03-04. The library's records indicate that all operating funds were expended. At least part of the surplus came from salary dollars that accumulated due to staff turnover. For discussion of budget adequacy, see 5.2.1. below.

5.2. FY 04-05 budget. See attached Business and Finance Report, appendix E.

5.2.1. The library has the same "original operating budget" in 04-05 that it had in 03-04 and in 02-03. Since the prices of print journals and electronic databases have gone up about 8% each year, this is obviously not enough money for the library to continue doing what it is doing, let alone add new resources and services.

From FY 1995-96 to FY 2001-02, the library's operating budget increased by a total of \$31,135 or 3.6%. This is a truly shameful record of lack of support for the library. In 2001-02, the library's operating budget was lower than that of any of our subset of peer institutions. (The library uses a subset of the university's peer institutions for comparison purposes. These are fourteen private universities in the Loyola reference group that offer masters degrees and received scores of 90 or above in the U.S. News rankings in fall 2001). In 2002-03, the library's operating budget increased by \$347,600, a 38.9% increase. This wonderful increase allowed the library to reinstate its book approval plan, pay for the increased cost of its print periodical subscriptions without slashing its book budget, add useful electronic full-text resources, and enhance instructional technology in the library and in campus classrooms. It also brought the library out of the basement in comparisons to the library budgets of peer group institutions, though still not to the average.

The library's operating budget in 2004-05 is the same as it was in 03-04 and 02-03, and this points to a continuing and very serious problem. The library and in turn the faculty and students who use it benefit most from steady support and increases that match the increased cost of information resources and provide for the maintenance and enhancement of equipment, facilities, and services. This kind of budget planning has not occurred over the last ten years. This problem should be addressed in the new two-year budget planning cycle that is now being implemented.

## **6. Resource Needs/Wants/Reallocation, FY 05-06 – FY09-10**

### 6.1 – 6.1.1. Personnel

The library has requested the following new positions in support of its strategic plan and as part of the Academic Affairs Strategic Agenda:

| 2005-06                            | Salary   | Benefits (27%) | Total    |
|------------------------------------|----------|----------------|----------|
| Administrative Assistant           | \$25,000 | \$6,750        | \$31,750 |
| Student Assistants                 | \$26,640 | \$7,193        | \$33,833 |
| Instructional Technology Librarian | \$50,000 | \$13,500       | \$63,500 |

### 2006-07

|                                |          |          |          |
|--------------------------------|----------|----------|----------|
| Information Literacy Librarian | \$50,000 | \$13,500 | \$63,500 |
| Technical Services Assistant   | \$25,000 | \$6,750  | \$31,750 |
| Media Services Specialist      | \$35,000 | \$9,450  | \$44,450 |

### 2007-08

|                                    |          |          |          |
|------------------------------------|----------|----------|----------|
| Digital Librarian                  | \$50,000 | \$13,500 | \$63,500 |
| Media Services Assistant           | \$25,000 | \$6,750  | \$31,750 |
| Student Technology Experts Program | \$23,680 | \$6,394  | \$30,074 |

### 2008-09

|                                 |          |          |          |
|---------------------------------|----------|----------|----------|
| Reference/Instruction Librarian | \$50,000 | \$13,500 | \$63,500 |
| Media Services Assistant        | \$25,000 | \$6,750  | \$31,750 |

### 6.2. – 6.2.2. Facility improvement

Although Physical Plant and WFF provide invaluable service and support for maintaining the library building, the library also assumes a financial responsibility for this work. Much of the upgrade of power and network access that has been necessary to support new technology, the reconfiguration of seating and services areas as new services have been implemented, the painting of scuffed and damaged walls in public areas, etc. has been paid for by the library. As the library building ages, these kinds of expenses will increase, and the university needs a reasonable plan for addressing them. The alternative is that plant needs will not be fully addressed and the library's appearance will suffer, or

these costs will continue to eat away at the operating budget. Ten thousand dollars (\$10,000) added to the library's base operating budget would support facilities maintenance.

### 6.3. – 6.3.2. Technology support:

As stated in 5.2.1. budget section above, the operating budget increase that the library experienced in fy 2002-03 enabled the library to provide increased support for technology, both in the library and in campus classrooms. This includes repairing or replacing broken or outdated equipment. In 2003-04, the Information Technology Department took budgetary responsibility for upgrading most public computers in the library and began making an annual contribution to cover about 20% of the library's public printing costs. Also, beginning in 2003-04 a portion of the student technology fee was allocated to the colleges and the library to help pay for costs associated with technology used by students.

All of these events have helped the library meet on-going information and instructional technology costs, especially equipment costs. However, it has been challenging to find money to purchase or upgrade software that supports the library's information systems. For example, in 2002-03, the library received end-of-the-year money to purchase software that allows students and faculty to search across multiple databases and link citations in one database to full-text articles in another database. Without the end-of-year money the library would not have been able to purchase the software. An additional allocation of \$30,000 to the base operating budget would allow the library to maintain its investment in technology and invest in new systems and capabilities.

### Professional development support:

In 2004-05, the library doubled the amount of money allocated to professional development, from \$10,000 in 2003-04 to \$20,000 in 2004-05. However, the reality is that the library spent almost \$40,000 on professional development activities in 2003-04, with most of the money coming from restricted accounts. The library's professional development team has created a professional development plan and is now in the process of working with libraries at Tulane and UNO to create a professional development consortium. The professional development team submitted an application for the American Library Association's H.W. Wilson Library Staff Development Award, which resulted in an award of \$3,500 that will fund fall workshops on giving and receiving feedback, time management, and conflict resolution.

The changes that are going on in libraries today require professional development at every level of the organization. Library faculty and staff have requested support for travel and conference attendance in 2004-05 totaling \$40,000. This would require an additional allocation of \$20,000 to the library's base operating budget.

### 6.4. – 6.4.2. Budget reduction/reallocation/revenue generation plans

Attached are several scenarios for the Monroe Library's 2005-06 operating budget. The first (Appendix F) is the recommended scenario and involves a 16.6% increase. This increase would provide enough money to continue the library's 04-05 book buying patterns, renew journal subscriptions, and add electronic products for which there is high demand. It also includes a request for \$9,071, the amount required to implement the recommended upgrade of seven staff positions in the library. This amount does not include additional money for benefits.

The 2% reallocation in the third column maintains the operating budget at its 04-05 level and reallocates \$76,000 from the print periodical budget, with the largest increase going into the electronic resources budget. This is actually a 6% reallocation.

The fourth, fifth, and sixth columns place a 1%, 2%, and 3% increase in the electronic resources budget.

Assuming that the 16.6% increase is implemented, budget projections for 2006-07 and 2007-08 are also attached (Appendix G). The modest increases called for in these budget projections would allow the library to maintain its buying power and make strategic investments in high demand services and resources.

In 2003-04 the library raised almost \$131,000 in the form of annual funds, endowment funds, or gifts-in-kind. In the future, fund raising will be an increasingly important source of support for the library and its programs. Additionally, the library will continue to actively pursue grant support.

## **7. Summary of achievements:**

The following are the major achievements of each of the library's teams.

Acquisitions and Cataloging Team:

- \* Transferred the music library, electronically and physically, from its old location in the College of Music to its new location in the Monroe Library. This involved every member of the team and included changes in work, alterations in the catalog and in other parts of the integrated library system, as well as the physical move of material.
- \* Shifted the entire collection of bound periodicals on the second floor. This was necessary both to open space for the arriving music periodicals and to provide room for growth for the whole collection.
- \* Evaluated, refined and implemented methods of managing the team's workflow to best take advantage of personnel and innovations such as Promptcat, a service that provides cataloging information as books are acquired. This process benefited from the organizational workshops and from the reallocation of a part-time position to assist with book shipments and with other projects as needed.

#### Circulation Team:

- \* Supported the move and use of the music collection in the Monroe Library.
- \* Implemented the extended circulation staff schedule to provide staffing until 2 a.m. Sunday through Thursday.
- \* Rearranged shelving schemes of the entire collection.
- \* Held successful fall and spring student worker orientations.

#### Development Team:

- \* Raised \$51,743 in annual funds, \$69,078 in endowment funds, and gifts-in-kind valued at approximately \$10,000.
- \* Developed and implemented strategies for raising matching funds for NEH challenge grant to establish the Center for the Study of Catholics in the South.
- \* Supported the expansion of the Library Visiting Committee with nine additional members and assisted in hosting three meetings.

#### Information Resource Team:

- \* Accomplished the annual serials review and added electronic products to the library's resources.
- \* Implemented *Get It!* and *Search It!* products (SFX and Metalib) and made them available to the students and faculty.
- \* Initiated membership in the Amigos network to take advantage of discounts on group purchases of electronic products.

#### Librarian Liaisons:

- \* Hosted two successful meetings of departmental liaisons to the library.
- \* Developed liaison web pages in each discipline.
- \* Created a new format and revised subject collection development policies for posting on the library's web site.

#### Media Services Team:

- \* Videoconferencing:  
Introduced new videoconferencing system to the campus in Fall, 2003. Purchased furniture for Room 210 via Libby-Dufour grant. Installed videoconferencing system in Communications 303/304. Received Faculty Course Development grant to support faculty use of videoconferencing. Held "Video Connections" promotional event. Provided videoconferencing services for C. Wessinger's Media & Religion course during the spring semester; this is the first time that she was able to hold this course using Loyola's videoconferencing facilities.
- \* Campus classrooms:

Oversaw new presentation equipment installations in six campus classrooms. Also installed combination DVD/VCR players in 38 classrooms. Provided extensive training for faculty users.

\* Media production:

Produced "Dead Man Walking School Theatre Project" video with Sr. Helen Prejean. Increased high-end video documentation of campus events for cablecast on NOETC local educational access, providing the channel with the first new Loyola and library-branded programming in over five years. Also, introduced both DVD duplication and authoring services.

Outreach Team:

- \* Completed the successful search for and hiring of an Outreach Librarian.
- \* Developed a template for in-house promotion of library activities and explored design software.

Professional Development Team:

- \* Created a professional development consortium with the libraries at UNO and Tulane.
- \* Developed a comprehensive professional development budget request.
- \* Wrote and submitted the winning application for the American Library Association H.W. Wilson Library Staff Development Award.

Reference Team:

- \* Charter member of the Association of Jesuit Colleges and Universities Libraries Virtual Reference consortium
- \* Organized new system for tracking statistics at the reference desk.

Sirsi Team:

- \* Upgraded and customized the look of the online catalog.

Steering Group:

- \* Developed the 2004-07 Library Strategic Plan.
- \* Sponsored two successful All Library Meetings for planning and professional development.
- \* Refined and documented the library's planning and budgeting cycle.

Technology Team:

- \* Planned and carried out technology purchases and projects totaling approximately \$142,000, which provided updated computers, equipment and other improvements to library public and staff areas, as well as to classrooms throughout the university.
- \* Solicited technology proposals from all areas of the library for 2004-2005. Planned and prioritized purchases for these proposals.
- \* Created library computer plan for 2004-2007, which incorporates the process of leasing many staff computers that had been purchased in the past. This will improve the planning process for library computer acquisitions and make budgeting more consistent.

#### Special Collections Team:

- \* Received the Cornet Papers.
- \* Completed the organization of the Gulf Restoration Network Archives.
- \* Completed the organization of the Norman Treigle Papers.

#### User Education Team:

- \* Met with each college dean to identify opportunities for integrating information literacy into first year experience programs.
- \* Created the concept for the Center for Information Literacy and developed a faculty advisory board.
- \* Wrote FIPSE and IMLS grant proposals to support the Center for Information Literacy.

#### Web Team:

- \* Worked on finalizing the new home page including the improved look, new links, and enhanced content. Of special note were the development of the calendar and the implementation of the news announcement feature that takes advantage of PHP and MYSQL.
- \* Working with Laurie Gibson and Edward Iglesias, developed new Quick Searches to print journals, e-journals, and music materials in the catalog. These quick searches will be used in the "Search For" function.
- \* Worked with User Education team to revamp web pages and created several new forms for the library: instruction request form, incident report form, collection development policy form.

