1. Executive Summary


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 2005. The library plans to conduct LibQUAL in 2006 as part of an Association of Jesuit Colleges and Universities consortial effort. 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.

In spring 2005, the library also piloted use of the Educational Testing Service’s Information and Communications Technology assessment tool. The library will evaluate the results and decided whether to implement the survey in 2005-06.

1.4. The top four strategic goals to be accomplished in 2005-06 are
* Implement two new information literacy courses, one in City College and the other in the College of Music.
* Partner with the College of Arts and Sciences, Student Affairs, and the Jesuit Center in the Living Learning Communities.
* Complete 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 user services.

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 this need will be addressed in the two-year planning cycle that is now being implemented.

1.7. In internal surveys such as the Student Exit Survey and in external sources such as the Princeton Review, the Monroe Library has been cited for its excellent services and resources. In 2004-05 the library sought to fulfill its goal to be a model of what academic libraries are and will become by piloting the one-desk model of public service, completing the development of an ambitious strategic plan, and gaining approval for information literacy programs in the College of Music and City College.
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 Appendices A and B

2.2.2. See Appendix C
3. Assessment

3.1. A major assessment tool for the library is the annual LibQUAL survey, which the library conducted in 2003, 2004, and 2005. The library plans to conduct LibQUAL in 2006 as part of an Association of Jesuit Colleges and Universities consortial effort. 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.

Each librarian liaison meets with departmental teaching faculty to better understand concerns and issues raised in LibQUAL. Library instructors 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. In spring 2005, the library piloted the use of the Educational Testing Service’s Information and Communications Technology assessment tool and will be evaluating the results this year.

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 D.

The library compares these and other statistics to those of peer group institutions. The library belongs to the Affinity Group, composed of libraries at nineteen private, selective, comprehensive universities that have committed to sharing statistics and other information annually. The library uses the Association of College and Research Libraries Academic Library Trends and Statistics as a basis for comparisons to libraries at institutions in the university’s reference group. The libraries from Jesuit colleges and universities share statistics on an annual basis.

In the past year the library has completed 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. The new strategic plan is being used to inform team and individual plans and to guide the library in setting priorities. The library has developed a comprehensive planning calendar that links planning at the
individual, team, and organizational levels and ensures that assessment activities are carried out in a timely fashion.

3.2 – 3.3. The library’s strategic goals for 2004-05 included:

* Explore and test the “one desk model” that would combine circulation, reference, and technology support at one service point.

  The model was tested in summer 2005. The public services library faculty and staff felt that more planning and training were needed to make the model a success. The library hopes to work with a library organizational consultant over the next academic year to identify and begin implementation of an appropriate service model for the Information Commons.

* Lead initiatives to develop more multimedia classrooms on campus.

  Library faculty and staff coordinated the installation of new presentation equipment in Bobet 212, plus oversaw significant improvements in Bobet 332 and 102. Additionally, they began planning for new installations in four campus classrooms to be carried out in August 2005.

* Bring up a new library web site.

  This was accomplished in fall 2004. After an initial drop in web site use as students and faculty became acclimated to the new site, use of the site has increased substantially, indicating the site’s success in providing information about the library and guiding users to information resources.

* Plan information literacy courses for City College and the College of Music.

  Planning for these courses occurred in spring 2005, and they will be implemented in spring 2005 or fall 2006.

* Develop partnerships with College of Arts and Sciences programs, including the Program for Instructional Effectiveness Support (PIES), Living Learning Communities, and the First Year Experience program.

  Library faculty and staff spent a day with PIES participants in summer 2005, covering such topics as information literacy, web resources, copyright issues, Blackboard instruction, FYE support, and online tutorials. They are also members of the cross-university teams that will be working with the Living Learning Communities. In addition, the library is providing a reading list and an exhibit of photographs to support the First Year Experience program.

* Raise money to match the National Endowment for the Humanities challenge grant in support of the Center for the Study of Catholics in the South.

  The library was instrumental in raising over $278,000 for CSCS.

* Complete a program review of information resource development and find new ways to communicate to teaching faculty the extent to which the library provides support for their subject disciplines.
The program review was completed. The library developed profiles of information resources in each subject area, including lists of print and electronic journals that the library provides and the books purchased in each discipline over the last year.

* Begin to work with the Cornet Collection, identifying what is in the collection and what needs to be done to organize, preserve and publicize it.

The Cornet Collection arrived in summer 2004. A photographic consultant has evaluated the collection and made recommendations on steps that should be taken to preserve the photographs. The collection has been visited by participants in several conferences, including the Society of American Archivists and the African Studies Association. A display of materials from the collection is planned at the New Orleans Museum of Art through a grant from the Louisiana Endowment for the Humanities. A gift has also been pledged to fund a visiting scholar to work on arranging the collection.

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 five strategic goals to be accomplished in 2005-06 are

* Implement two new information literacy courses, one in City College and the other in the College of Music.

  Expected outcomes: First year or term students in City College and the College of Music will learn information and technology skills that will improve their academic performance and enhance lifelong learning.

  First year or term students in City College and the College of Music will be retained in greater numbers.

* Partner with the College of Arts and Sciences, Student Affairs, and the Jesuit Center in the Living Learning Communities.

  Expected outcomes: First year students in the College of Arts and Sciences will learn information and technology skills that will improve their academic performance and enhance lifelong learning.

  First year students in the College of Arts and Sciences will be retained in increasing numbers.

  The collaboration between the library and other campus units in the LLC will be a model for cross-campus collaborative efforts.

* Complete 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: CSCS will be fully endowed and will enhance resources in the library and at the university that support the study of southern Catholic history and culture.
Donors to CSCS will continue to support the library and university.

* Complete a comprehensive program review for user services.
  
  Expected outcome: The library will gain a better understanding of the strengths and weaknesses of the current service models in user services, will retain and improve what does work, and will eliminate what doesn’t work.

* Take a major role in supporting faculty who wish to develop online courses.
  
  Expected outcome: The quality of existing online courses will improve, and the university will develop a standard approach to creating new online courses.

5. Budget

5.1. FY 04-05 budget. See Appendix E. The difference in the budget set-up and expenditures is end-of-year money that was transferred by the Provost’s office into the library budget to enhance library collections, services, and facilities, and to upgrade campus classrooms.

5.1.1. For discussion of budget adequacy, see 5.2.1. below.

5.2. FY 05-06 budget. See Appendix F.

5.2.1. The library has the same “original operating budget” in 05-06 that it has had since 2002-03. 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. The end-of-year money that was provided by the Provost’s office in summer 2005 was very useful. This kind of support needs to be built into annual budget allocations.

From FY 1995-96 to FY 2001-02, the library’s operating budget increased by a total of $31,135 or 3.6%. In 2001-02, the library’s operating budget was lower than that of any of its 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 stagnant budget 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. At this time, none of these positions
has been funded.

<table>
<thead>
<tr>
<th></th>
<th>Salary</th>
<th>Benefits (27%)</th>
<th>Total</th>
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<td>2005-06</td>
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<td>Administrative Assistant</td>
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<td>2006-07</td>
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<td>2008-09</td>
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<tr>
<td>Reference/Instruction Librarian</td>
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<tr>
<td>Media Services Assistant</td>
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<td>$6,750</td>
<td>$31,750</td>
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</tbody>
</table>

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, and other
building maintenance 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.
The university took an important step toward meeting this goal when at the end of FY 2004-05, it allocated $10,600 of end-of-year money toward recarpeting the hall of the library’s heavily used 24-hour wing, and $1,637 toward replacing damaged white boards in seven group study rooms.

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. In 2004-05, library received $10,400 to purchase software for electronic ordering of books and other library materials. Without the end-of-the-year money, the library would not have been able to purchase these items. 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 and in 2004-05, with most of the money coming from restricted accounts. The library’s professional development team has created a professional development plan and is working with libraries at Tulane and UNO to encourage shared professional development activities. In summer 2004 the library was awarded the American Library Association’s H.W. Wilson Library Staff Development Award, which resulted in an award of $3,500 that supported 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 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 is a recommendation for the Monroe Library’s 2006-07 operating budget that calls for a 13.5% increase (Appendix G). 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.

Assuming that the 13.5% increase is implemented, budget projections for 2007-08 and 2008-09 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. Projecting out to FY 10-11, at this time we recommend that the university plan for a minimum 5% annual increase in the library’s operating budget. The allocation of this money will change over time as new technologies and new formats influence the way students and faculty get information. However, a modest but steady increase is necessary to ensure the services and resources Loyola’s faculty and students need.

In 2004-05 the library raised almost $132,646 in the form of annual funds or endowment funds. In the future, fund raising will be an increasingly important source of support for the library and its programs. Additionally, the library will continued 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:

* Redistributed work while team leader Laurie Gibson was on sabbitical. Many of these work assignments remained with team members when Laurie returned.
* Planned and implemented the popular fiction paperback collection.
* Switched from using OCLC Passport and CatME software to OCLC’s new software, Connexion.

Circulation Team:

* Tested the one-desk model of service delivery.
* Began circulating MIDI keyboards and iLocs for the Macintosh computers.
* Implemented a voice alarm system to reduce theft.

Interlibrary Loan/Document Delivery Services Team:

* Designed, assembled, and began using a rolling scanning cart in the stacks.
* Upgraded to the newest version of ILLiad.
* Installed a toll-free number for distance students to use.
* Implemented electronic delivery of articles.

Information Resource Team:

* Added fifteen new databases to the library’s electronic offerings.
* Provided leadership and information for the Information Resources Program Review.
* Assisted in making the library’s collection development policies available on the library web site.

Librarian Liaisons:

* Completed the collection development policies and placed them on the web site.
* Completed liaison web pages.
* Revised and maintained lists of Internet resources on the web site.

Media Services Team:

* Installed new presentation equipment in BO 212, plus significant improvements in BO332 and BO101. Began planning for new installations in four campus classrooms to be carried out in August 2005.
* Encouraged and saw an increase in the use of videoconferencing by faculty for their classes. Produced Loyola’s first major multi-site videoconferencing event in March, a conference for LIM involving six national sites plus a site in Scotland.
* Provided video overflow for major campus events so that large audiences could attend in additional lecture halls, including the FYE lecture (Jonathan Kozol), Fr. Wildes’ inauguration ceremony, the U.S. presidential debates, the Maya Angelou lecture, and the Loyola graduation ceremonies.

Outreach and Development Team:

* Created and implemented a marketing plan, complete with goals, a calendar, and assessment measures.
* Worked with Institutional Advancement staff to create a Center for Information Literacy (CIL) brochure. Promoted the CIL, information literacy, and the Living Room.
* Supported the library’s successful Parents Campaign, which raised money for a portable classroom consisting of laptops and cart.
* Held a thank-you brunch for parents who gave to the campaign to establish the Information Literacy Living Room.

Reference Team:

* Charter member of the Association of Jesuit Colleges and Universities Libraries Virtual Reference consortium
* Organized a new system for tracking statistics at the reference desk.
* Tested the one-desk model of service delivery.

Steering Group:

* Wrote the SACS library report.
* Completed the strategic plan.
* Completed the 2005-06 budget requested and developed the preliminary 2006-07 budget request.

Technology Team:

* Planned and carried out library technology purchases and projects that provided updated computers, equipment and other improvements to library public and staff areas, as well as to classrooms throughout the university. Solicited and reviewed technology proposals from all areas of the library for 2005-2006. Planned and prioritized purchases for these proposals. In addition, provided library dean with budgeting recommendations through 2007 to help anticipate technology needs and costs for the next two years.
* Created library computer plan for 2005-2006. Reviewed leasing process and significantly reduced costs in this area. Leasing improves the planning process for library computer acquisitions and makes annual budgeting more consistent.
* Working with the library dean and IT director, researched and evaluated print management systems. Developed and carried out surveys of other libraries with regard to this.

Special Collections Team:

* Cataloged all books in the Jesuit provincial archives: roughly 3,700 volumes, of which about 2,000 were first-time records.
* Processed Nash Roberts hurricane records (roughly 30 linear feet).
* Hired a new Special Collections Librarian/Archivist.

Student Supervisors Team:

* Refined and extended our senior recognition project
  ~ Created a display of books with bookplates and photos of seniors; placed an item on the web page.
  ~ Revised the senior exit interview survey questions
  ~ Sponsored senior luncheons.
* Completed the update of student job descriptions.
* Sponsored the annual Halloween pizza party.

User Education Team:

* Planned and received approval for a for-credit information literacy course for freshmen in the College of Music. Prepared to pilot an information literacy course for City College.
* Worked with the Outreach and Development Team to successfully raise funds from Loyola parents for 25 laptops and a cart.
* Piloted a new ETS information literacy assessment program and made plans to implement it in 2005-06.

Web Team:

* Completed the new web site design.
* Developed an intranet to support the SACS review.
* Set up links to individual resumes.
* Implemented the news and calendar features on the new home page.