Submitted by Fred Barnhart, Associate Dean for Library Services and Collections

The Public Services Division is comprised of Access Services, Administrative Services, the Klarchek Information Commons, Lake Shore Campus Reference Services, and the Lewis Library. Several committees also play a role both in time commitment and in developing and maintaining services and collections to the patrons of the University Libraries. The committees include the Electronic Resources and Periodicals Committee (ERPC), the Collection Managers Committee (CMC, formerly the Bibliographers’ Group), the Learning Commons Initiative Advisory Board (LCIAB, newly formed in June 2009), and the Collection Development Steering Committee (CDSC).

The 2008-09 year was a successful one for all departments within the Public Services division, and the theme once again was adaptation and change. The year included several changes not only to the facilities of the University Libraries, but also to personnel, collections and services of the Public Services Division. While many of the changes had the potential to be hugely disruptive to library services, the faculty and staff of the University Libraries viewed each change as an opportunity to improve the services offered to our patrons, and responded accordingly.

Personnel:

Personnel changes had a large impact on the Public Services Division during the past fiscal year, as the following people left the University Libraries: William Cuthbertson, Reference and Government Documents Librarian; Hilary Shaffer, Late Night Supervisor for the Information Commons; Dana Zbysynski, Weekend Supervisor for the Information Commons. New additions to the University Libraries include Annette Alvarado, Lewis Library Evening/Weekend Supervisor; Jane Currie, Reference Librarian; Aparna Ghosh, Lewis Library Reserves Associate; Jen Jacobs, Interlibrary Loan Librarian; Jamie McDonald, Reference and Government Documents Librarian; Carey Portis, Weekend Supervisor for the Information Commons; Ted Quiballo, Late Night Supervisor for the Information Commons; and Tara Radniecki, Reference and Electronic Resources Librarian.

The hiring process, especially the library faculty search committees, required commitment from several members of the staff in each instance. In addition, the entire University Libraries staff demonstrated their interest in the future of the University Libraries by attending candidates’ presentations, participating in meetings with the candidates, and providing feedback to the search committees.

With the Lake Shore Campus Reference Department being short-staffed during the fall 2008 semester, and Jeannette Pierce, Head of LSC Reference, being out on maternity leave during the latter part of the spring semester, several other staff helped out where they could. The Lake Shore Campus Reference Staff rose to the occasion with the assistance of Leslie Haas, Niamh McGuigan and Jennifer Schwartz. Leslie served as temporary Head of Lake Shore Campus Reference, Niamh scheduled the reference desk, and Jennifer Schwartz worked as a part-time temporary librarian filling in approximately 20 hours per week.
In order to facilitate better understanding of different service desk needs the Cudahy Library and the Klarchek Information Commons instituted cross training between several IC and Library staff. The cross training also helped to prepare all staff for the possibility of filling in at one of the service desks, especially in a situation where a desk is short-staffed due to illness or some other emergency.

Finally, the University Libraries hosted three MLS students during the past year. Susan Hanf from the University of Wisconsin-Madison completed a semester-long practicum with us in Fall 2008, Joseph Goetz from the University of Illinois, Urbana-Champaign, completed a week-long Alternative Spring Break program with us in March 2009, and Adam Girard from the Dominican University completed a semester-long practicum in Spring 2009.

Library as Place:

The University Libraries is very aware of the role that space plays in the perception of services, accessibility of collections, and general patron satisfaction with time spent in our facilities. Especially at the Lake Shore Campus we have seen dramatic increases in patron satisfaction, due not in small part to the addition of the Information Commons in 2008 and the ongoing improvement of several spaces in the Cudahy Library. Despite a loss of space the Lewis Library at the Water Tower Campus has maintained its high satisfaction rating with patrons, primarily through the continuing dedication to excellent service by its staff.

The Cudahy Library, the Reference Department’s offices were moved for the second time in as many years. This move once again included modest but effective renovations to their new space, but also unfortunately meant a loss of public space. Happily the Willouise Donovan Reading Room (aka the “Echo Room” and formerly the “Cudahy Reading Room”) received not only a new name, but also received new bathrooms in the space formerly occupied by the Reference Department, making the main floor of Cudahy much more patron friendly. The reading room space is occasionally being used for events as well, with this secondary use being coordinated and monitored by Anne Reuland. Renovations also began on the rest of the bathrooms in the Cudahy Library and the main floor received the addition of a digital sign at the Circulation Desk and ten new “stand-up” work stations in the space formerly occupied by the Reference Desk. Finally, a popular “new book” display was created at the entrance to the IC Link.

Some building changes were more controversial than others, as demonstrated by comments directed at the decision to close the Cudahy Library Doors, making the IC doors the primary entrance for the Lake Shore Campus libraries. While enhanced security was the primary motivator for the decision, the change had the added benefit of redirecting classroom traffic away from the Cudahy Library space, making it much more conducive to study. A great deal of planning and preparation went into ensuring a smooth transition as the Library and IC doors, and traffic flows merged in August 2008 through the Cudahy Library door, and then shifted permanently to the IC door in January 2009. Leslie Haas, Anne Reuland and Ursula Scholz cooperated to manage the transition with very few glitches.

The already popular Information Commons became even more popular with the newly remodeled 4th floor space. The University Libraries assumed responsibility for coordinating and scheduling the space, giving priority to academic events. Leslie Haas worked closely with
facilities, catering, security and other campus groups to establish the guidelines for use of the room by Loyola University units. With the growing demand for the 4th floor space we are investigating ways to streamline the scheduling process and still assure best use of the space for academic events. During the spring 2009 semester alone the space was reserved for more than 80 events. In addition to the 4th floor the Information Commons also received improvements in the form of revised signage, relocated furniture, and additional sound proofing to some of the group study rooms. Finally, following a naming contest in which more than 600 contestants participated, the Information Commons café was officially named Connections Café.

At the Water Tower Campus, the Lewis Library was made more patron-friendly through the addition of new chairs for the 6th floor computer cluster, additional group workstations on the 6th floor, and additional WiFi connectivity on the 9th floor. The addition of a digital sign on the 6th floor also allowed for greater promotion of library services and resources.

Finally, through a capital funds project the Library Storage Facility (LSF) received a much needed addition of compact shelving, which will in turn allow the University Libraries develop additional space for students by relocating some parts of the collection to LSF. The project added approximately 12,000 linear feet of shelving, which could accommodate up to 85,000 volumes.

**Service Trends:**

Overall the University Libraries saw a decrease in charged/renewed materials (Cudahy -16%)(Lewis -4%), although this is immediately following a year in which we saw a dramatic increase in circulation as well.

Use of electronic reserves by faculty (+63%) is outpacing the use of print reserves (+11%). In a related statistic, though, student use of print reserves is decreasing (-10%). Data on use of electronic reserves has not yet been captured.

In keeping with national library trends, reference activity decreased at the Lake Shore Campus (-60%), and also at the Water Tower Campus (-21%). Some of the decrease in reference activity at the LSC can also be attributed to the relocation of both the reference service desk and the reference offices which removed the service point from a high traffic path. We are anticipating a rebound in activity as patrons become more familiar with the new location and as library instruction highlights reference services in general.

Library Instruction increased for both the Water Tower Campus (+39%) and the Lake Shore Campus (+22%), highlighting the increased request for bibliographic instruction by the University Libraries. This is a very positive trend which also reflects the emphasis on instruction by the University Libraries. We are hopeful that the positive trend in instruction will also positively impact the decrease in reference activity.

Perhaps indicative of an increase in the quality of our book collections, and the success of programs like Purchase on Demand, interlibrary lending TO other institutions increased (+5%) while borrowing FROM other institutions decreased slightly (-.76%).
Outreach and Liaison Activities:

With the assistance of the Public Relations Committee, a new faculty liaison brochure was created to highlight the services available to faculty, and provide an easy handout for Subject Specialists to use when contacting faculty. Subject Specialist Librarians are increasingly using the University Libraries’ LOCL blog to highlight and promote library services, such as new resources and instructional sessions. In addition, Librarian Liaisons are routinely attending faculty meetings in order to promote services and collections, or just learn more about the current issues in the various schools and colleges. Finally, with the assistance of the University Marketing and Communications Departments, the Klarchek Information Commons, Cudahy Library and Lewis Library are making good use of their digital signs to promote library programs and services. The signs have also been used for special events such as President Obama’s inaugural event, or President Garanzini’s State of the University address. With the turnover of library faculty we have also had opportunity to reorganize and reassign some librarian liaisons:

- Government Documents, Political Science, Sociology, International Studies, and Peace Studies: Jamie McDonald assumed Subject Specialist responsibilities (formerly held by William Cuthbertson).
- Mathematics and Natural Sciences: Kristina Schwoebel assumed Subject Specialist responsibilities (formerly held by Sherri Saltzman).
- Theology, Philosophy, Islamic World Studies, and Classical Studies: Jane Currie assumed Subject Specialist responsibilities (formerly held by Sr. Rita Stalzer).
- Biology and Nursing: Tara Radniecki assumed Subject Specialist responsibilities (formerly held by Sherri Saltzman and Stephen Macksey).
- School of Communication: Taya Franklin assumed Subject Specialist responsibilities for those portions of the SOC that were shifted primarily to the Water Tower Campus. Niamh McGuigan retained Film Studies, which remained at the Lake Shore Campus.

New Tools, Services, and Resources:

Public Services began exploring and offering several new services and tools during the past year. Some were related specifically to new equipment, such as the addition of ten laptops at the Lewis Library or a new ATM machine outside the Connections Cafe. Others were more about the introduction of new software or processes, such as the addition of webcams and Skype to our cross-campus communication tools.

LibGuides, which the Subject Specialist Librarians started using in FY 2008, has evolved into a very useful Reference and Instruction tool during FY 2009, with nearly 70 published LibGuides, including several course-specific guides. The development of LibGuides flourished during the past year, as the Subject Specialist Librarians made use of the tool to develop not just subject guides, but also course guides, help guides, and guides to more specific aspects of the University Libraries, such as our decorative art pieces.
Interdepartmental and intercampus communication was improved in the past year through the addition of several new tools. The Public Services’ desks and staff began using Groupwise IM during the fall of 2008 to allow each service desk to quickly and efficiently disseminate information or ask a question of the larger group on duty at the time. It was quickly adopted by the rest of the staff as well as an effective means of communicating. Webcam technology, in conjunction with the Skype software, was also adopted by many of the staff as a means to improve cross-campus communication and save on the need to travel between campuses for meetings or reserve the video-conferencing facilities at both campuses. Skype is also being used to maintain contact with the Rome Center Library, although the bandwidth is not yet sufficient for the use of webcam technology.

The Public Services staff began using the open-source package, LibStats, in Fall 2008 to track the type and number of Reference and Circulation questions being asked at the various services desks at Cudahy, Klarchek, and Lewis. This was implemented as a response to the relocation of the Reference Desk and an attempt to study and minimize the disruption to reference services, but has become a useful tool for all of the University Libraries’ service points.

Information Commons programs were developed during the past year as a coordinated effort between Leslie Haas, Jeannette Pierce and their respective staffs, including mid-day music by students, an environmental film series in cooperation with CUERP, and a number of instructional sessions. The spring semester also included a pilot program, organized by Jane Currie, which involved a contest to encourage greater student participation in University Libraries programming. Finally, the University Libraries once again extended hours to 24 hours for several evenings preceding and during finals.

One of this year’s highlights for the ERPC was a budget enhancement of $260,600, which enabled the purchase of several new databases and periodicals, as well as the upgrade of several electronic resources. We were particularly pleased to acquire resources to support new and expanding programs on campus this year. For example, we purchased the Los Angeles Times Historical and the Civil War Newspapers databases, and added a current subscription to the Los Angeles Times at the request of the new School of Communication. We filled a request by the Department of Fine and Performing Arts for an online music product by licensing access to NAXOS, and added several online reference sources for music as well. Two general databases that deserve to be highlighted are our new subscription to Journal Citation Reports (JCR), which ranks journals within disciplines by impact factor and Readers’ Guide Retrospective, which provides access to articles published in popular periodicals in the 20th century.

By partnering with other University units the University Libraries was able to acquire expensive e-resources that would otherwise be difficult, if not impossible, to acquire. At the urging of the Center for Textual Studies, and working with the President, the Provost, and the Dean of the College of Arts and Sciences, the University Libraries were able to acquire six digital collections from Gale. The addition will have significant impact for nearly all of the humanities programs, but primarily history, communication, and English departments. ArtStor was also added, in cooperation with the Department of Fine Arts. The University Libraries is encouraged by the potential of this model and will continue to seek out additional opportunities to partner with other University units.
Two collection analysis tools (Bowker and OCLC) were both utilized during the past year. The Bowker tool compares our book collection to that of a “model” academic library serving an undergraduate population. This allowed the Subject Specialist Librarians to locate and fill gaps in our existing and new collection areas, such as the School of Communications, Performing Arts, and Islamic Studies. We will continue to use the tool through December 2009, although because of the nature of the Bowker tool we will only subscribe to it every other year, or every third year, primarily in order to identify core collections for new disciplines.

The OCLC tool allows the University Libraries to compare our book collection to the existing collections of other institutions of our choice, as available. We chose several institutions from the pre established list of middle weight and heavy weight peers which allowed our comparisons to remain consistent with other areas of the University. The initial analysis revealed a number of areas where our print collection has dipped below those of our heavy weight, or even middle weight peers. Our present and future collection analysis using this tool will focus on ways to reallocate book funds in order to minimize gaps in the collection.

The book sale, which was held in October 2008, was successful, especially given that it was the first held at the University Libraries in more than a decade. An estimated 2500-3000 books were sold, and $1435 was raised for the Sr. Rita Stalzer Women and Religion Book Fund. Several staff helped by organizing the book sale and staffing the event. Leftover books were donated to Better World Books.

Finally, the spring semester was also used to develop a report on the Learning Commons philosophy, with a plan for moving the University Libraries toward a Learning Commons model by August 2010. The Learning Commons Task Force included Fred Barnhart, Jane Currie, Leslie Haas, Bruce Montes (ITS), Jeannette Pierce, Tracy Ruppman, and Carol Scheidenhelm (LTA). The task force developed the report through literature reviews, faculty focus groups, and discussion about the ways in which University Libraries can meet the changing and emerging needs of teaching, learning, and scholarship at Loyola University Chicago.
Goals for 2010:

(1) Improve library collections by using collection analysis tools, patron-initiated purchasing and faculty input to focus acquisitions; using the value assessment tool to tailor the electronic resources collection; improving organization of and access to the government documents collection; and by improving access to new media, such as streaming video.

(2) Promote University Libraries services and collections by working with the PR Committee; increasing use of Web 2.0 tools, creating a stronger presence in Blackboard courses, and increasing library instruction.

(3) Improve University Libraries’ spaces by assisting with the planning of upcoming Cudahy renovations, enhancing Cudahy Library Graduate Study spaces, streamlining the scheduling process for various event spaces, and through ongoing assessment of the use of University Libraries’ spaces.

(4) Enhance librarian liaison activity through more coordinated outreach to faculty.

(5) Enhance patron access to our collections through the continuing addition of e-book records to Pegasus, through exploration of WorldCat Local, improvements to ILLiad process, and by continuing to develop new LibGuides, such as course-specific guides.

(6) Improve library services through cross-departmental coordination, including training and referrals.

(7) Finalize shift to Learning Commons model by bringing the University Libraries together with other stakeholders to consider how to foster student learning and research, as well as the role that faculty, innovative spaces, programs, and services can play.
Annual Report, Fiscal Year 2008-2009
Access Services Department

Summary

The most noticeable change impacting access services this year was the different traffic and usage patterns created by moving the sole entry point for the library and the IC from the Cudahy doors to the IC doors. The late summer and fall were spent adjusting to the new security policies and coping with the increased workload created when the IC doors were closed for construction. We also made plans for the closure of the Cudahy doors. A lot of planning and preparation went into making sure the transition went as smoothly as possible, and with the help of Anne Reuland and Leslie Haas, we managed the transition with very few glitches. In order to make things more convenient for patrons, we have installed two book returns in the IC, and allow patrons to check out materials at the IC first floor desk. The book drop by the Cudahy doors continues to be used as well.

Another major change was the hiring of a new Interlibrary Loan Librarian. The previous librarian left in April of 2008, and our new librarian, Jennifer Jacobs, started in September 2008. She brought a lot of energy and new ideas, resulting in many changes to our ILL services and software, such as a new fine policy, new scanning procedures, and a new service for document delivery.

Finally, we focused on a number of areas where we lacked established, official, written policies, such as for faculty with long-overdue books. Some of these policies, such as one for relocating books between Cudahy and the LSF, are just beginning to be created. However, we have made good progress. Further details on these and other activities are below.

Core activities

Following a year in which we saw increases of over 9 percent, in this fiscal year overall transactions were down more than 16 percent. The largest declines were in basic circulation activities, presumably due to decreased foot traffic in the building. Interlibrary loan was the one service that saw an increase in activity, increasing by almost 5%. Patrons did make use of our policy to permit checkouts at the IC first floor desk; in 6 months 345 books were circulated there along with 67 renewals.

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<th>Percent Change</th>
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FY0809 Goals and Status

- Switch from using Ariel to ILLiad for patron online document delivery, which will include customizing document delivery ILLiad web pages
  - Completed in January 2009
- Codify policies/procedures for overdue books on faculty accounts
  - Ursula and Bonnie worked with Fred to create a proposal, which was submitted to the library board and approved in April 2009
- Process long-overdue books charged to faculty and departmental accounts
  - Ursula met with Bonnie, Avril, and David to codify new procedures in keeping with the new policy; ran reports for long-overdue items and have begun searching them.
- Increase awareness of fine policies by creating bookmarks
  - Bookmarks were created and distributed at the start of the fall semester.
- Codify procedures for cataloging of reserve items
  - In addition to creating written procedures and policies, Avril has worked closely with Aparna to ensure cross-campus consistency.
- Work with Fred Barnhart and the bibliographers to create a policy for relocating items to LSF
  - Ursula met with collection steering committee and discussed the issues. Some initial policies were defined with regards to relocating items to LSF. Details continue to be worked out.
  - Anna created a report on number of charges and browses on items from the LSF during a one-month period, to assist with the planning process.
- Hire and train new ILL Librarian
  - Jennifer Jacobs was hired and began work on September 2, 2008. She received two weeks of intensive training and orientation, followed by another month of specialized training. She also participated in the new faculty mentoring program, starting in December of 2008.
- Prepare for new entry gate procedures and assist with hiring and training monitor position
  - Although the monitor position reported to Anne Reuland through the fall semester, the monitor’s location at the circulation desk made it more practical for her to be trained and assisted by the Access Services department. We provided back-up support for questions or unusual circumstances and helped craft procedures for checking bags and scanning IDs.
- Plan for and enact service changes to accommodate closure of Cudahy entrance door
  - We recommended purchase of two book returns for the information commons and incorporated checking those returns into our work flow. We also created a new user ID for the 1st floor desk at the IC to facilitate book checkout there.
- Wrote job descriptions for all staff
- Implemented GroupWise instant messenger at circulation desk for communication with IC and reference in Fall 2008
- Investigated options for provision of reference service at Cudahy
  - After many discussions with different parties, we clarified what levels of service we can and should provide at Cudahy (help with known item searching of Pegasus and call number help). We also began using
LibStats, and participated in discussions regarding proper coding of requests.

**Additional Accomplishments**
- Oversaw impact to circulation with upgrade to Voyager 7.0 and made changes as needed
- Worked with technical services and reference to begin moving microfilm from 039 to LSF
- Created new happening location, print location, reporter set-up, circulation matrix, and security profiles for IC technology items
- Initiated new policy for circulating bound periodicals to faculty
- Implemented Odyssey software to scan, send, and receive articles
- Created new fine structure for ILL in January 2009
- Switched from making paper copies to only scanning articles for ILL in December 2008
- Completed project to integrate former Lewis materials into the LSF in December 2008
- Assisted with adding Law library to our ILLiad installation and made necessary changes, in May 2009
- Had locks changed on several carrels and levied fines for lost keys
- Successfully provided coverage for expanded 24/7 hours for finals

**Goals for FY0910**
- Monitor service and maintenance of copiers and begin preparations for review of contract, which expires July 2010
- Establish guidelines and procedures for streaming media
- Work with the Serials Department to create procedure for routing missing journal volumes for withdrawal
- Submit a proposal to the Library Leadership Team on creating a browsable media collection
- Review database licenses for ILL provisions
- Shift current periodicals to better utilize space
- Work with the Director of the Information Commons to enhance cross-training of staff
- Work with Systems and Reference on set-up and review of WorldCat Local
- Examine possibility of permitting on-shelf holds (paging books)
- Clean up old and/or unused pseudopatron accounts
- Switch to using ILLiad for intercampus loan requests
- Upgrade to ILLiad 8.0
Facilities

The year included several changes to the facilities:

Library Storage Facility compact shelving. The second installation of a possible five installations was completed in August. This project required consultation and labor from Karen Cherone, Stacks Supervisor, as well as other Access Services personnel. The primary contractor was Bradford Systems. Hallett Library Movers and Access Services student staff shifted the affected collections. LUC Facilities personnel managed related lighting and flooring work.

Reference Department Offices. In order to vacate space needed for restrooms, the Cudahy Library Classroom was dismantled and refurnished as the Reference Department Office. The copy room was relocated and the former copy room was refurnished as the office of the Head of Reference. This project was managed by Teresa Woyczynski and required patience and assistance from Reference and Access Services as well as ITS, Telecommunications, and LUC Facilities personnel.

Cudahy Library Lobby reconfiguration. The reference service to the IC provided the occasion to reconfigure the Cudahy Library lobby. The reference desk and related furnishings were removed. The former ready reference shelves were relocated to provide a larger and more visible site for New Books display. In order to relocate as many classroom computers to public areas, a stand-up computer table was relocated from the IC and wired for computers. This project involved Access Services, ITS, and LUC Facilities personnel.

Restroom Renovation. New restrooms were installed adjacent to the Reading Room. Existing public restroom on all floors were completely remodeled. This project was managed by Teresa Woyczynski and required the patience of the staff and library users alike. The result was worth the inconvenience.

Door change: Relocation of the Cudahy Library entrance provided the occasion to renovate former entry area. The revolving door was replaced by a delivery door. Alarms were added to the doors. Entrance and exit gates were removed. Vestibule flooring and west lobby carpet were replaced. This project was managed by Heather McNitt and Wayne Sliwa.

Student staff and Tom Linke reviewed thousands of books that had been offered but unsold at the October book sale as well as other gift books that were out of scope or withdrawn from the collection. The books were screened to identify those that could be sent to Better World Books, a business that uses book sales and donations to promote literacy. More than 4000 books have been sent to Better World Books for possible sale, donation, or recycling.

Graduate Study spaces were planned in May and June; in consultation with Graduate School and Purchasing personnel and based on the suggestions of student representatives. This project will continue into FY10.
Budget
The 2009 University Libraries budget included a 12.5% increase in the collections budget, and 2.9% increase to the student wage budget to offset the increase in the minimum wage. Student workers budgets were successfully managed by individual department heads. Minor reallocation and distribution of a $10,000 reserve at mid-year contributed to the management of these funds. Budget allocations in the non-salary operating lines were reviewed and redistributed for FY10 to better reflect actual spending needs. This review will be repeated in FY10.

Personnel
Individual Accomplishments: Kevin Kennedy continued his Staff Council term and serves as Staff Council Treasurer.

After considerable planning with benefit of input from Access Services and Information Commons heads, the library was successful in establishing and filling its first monitor position to increase security and to administer the community access policy on the front line. The position was filled, vacated and filled again during the course of the year. When the primary entrance was established at the Information Commons in January, the position transferred to the Information Commons, geographically and organizationally. This has worked well.

In addition, six support staff positions were filled in other departments during this fiscal year, requiring the support of the Administrative Services department for Human Resources processes.

FY2009 Goals Status
A number of departmental goals for FY2009 are still in process or on hold:

- Identify and complete short term requests, such as special cleaning, spackling, cosmetic painting, etc. Develop a system to improve looks and livability of building including reporting, tracking and following-up on building needs and Develop a timeline for improving and documenting one time maintenance requirements.

A number of short-term requests were filled. However, an overall system or reporting and requesting improvements is not in place and may not be practical until we are able to designate maintenance and repair funds. This in turn may not be advisable until we have a better sense when the building or the first floor may be renovated.

- Develop a Facilities checklist.
  Set aside. May be revived as a goal in the future. Facilities problems are reported as we become aware of them and that seems to be effective at present.

- Create a library wide facilities committee that meets monthly and includes student workers.
  Deferred. Reconsider during FY10.
Develop and implement a central site or database for statistics gathered in the libraries, including transaction, productivity, and assessment data. Not in process but still needed. This project should be completed in FY10, managed by the Business Manager, Kevin Kennedy.

Compile existing policies and procedures into a central manual or site. Not in process; project is not yet outlined.

Propose sign policy and procedures for Cudahy Library, including design and placement guidelines as well as production resources. In process. A working group has conferred with University Marketing and Communication to design a template for Cudahy Library signs using Loyola’s standards for font selection, color, and layout. Temporary signs using this template have been installed. Following a period of review, a permanent version of the signs will be produced and installed later in the Fall Semester.

Goals for FY2010

Complete installation of signs in Cudahy Library and publish guidelines for sign design and continuous, as-needed sign production. Fall Semester.

Complete installation of graduate student study space. Assess use and work with Graduate School to improve the space. Fall Semester.

Develop and implement a central site or database for statistics gathered in the libraries, including transaction, productivity, and assessment data. Fall and Spring Semester.

Compile existing policies and procedures into a central manual or site. Spring Semester.
Executive Summary:

It was a very eventful year for the Information Commons; during the past year we opened our doors, closed them and then re-opened them again. All this had an impact on how the building was used and perceived by the Loyola University community. This past year continued to be a year of trial and error, as we learned how the Loyola community used the IC and how we could provide the best service possible. Over the course of the year we had record numbers of visitors, programs, workshops and classes use the IC and it does not appear that this year will be any different. In fact, we anticipate more users as we face the closure of campus buildings that have accommodated student and organizational programming in the past. We have been discovered by the student population of Loyola and during the school year it is rare to walk through the building and not find students enjoying the many services and spaces available.

Highlights:

- Moved furniture and computers to accommodate student needs. This included requesting additional funds from the President to purchase additional chairs and tables to add study space to the third floor. Other projects included moving chairs and tables in response to student requests regarding use of space.
- Worked closely with University and Library facilities in the closing and re-opening of the main doors of the IC. Consulted with various groups in the move of the main entrance to the IC.
- The position of monitor was reassigned to the IC when the doors opened and after several months of uncertainty, moved forward with hiring Joshua Cummings as the newest full-time staff member of the IC.
- Worked closely with the IC/Library staff in revising and creating policies related to the use of the IC by our users.
- The 4th floor officially opened in early 2009 and we assumed responsibility for overseeing the use of the space. We worked closely with facilities, catering, security and other campus groups to establish the guidelines for use of the room by Loyola University units.
- Approximately 82 events were scheduled to use the 4th floor, these ranged from national conferences to departmental meetings.
- Room 112 was reserved by the Chapel to use on Saturdays for wedding parties to prepare prior to the start of the ceremony. We worked with campus security to provide easy access to the Chapel from the IC and a security guard is required to be present to facilitate the use of the room.
Added Group Study Reservation kiosks to each of the floors of the IC to facilitate self-service use.

Unlocked the Group Study Rooms on Level 2 and 3 to allow students to let themselves into the rooms.

Re-allocated two Group Study Rooms to the online reservation system, based on lack of use by the Library/ITS for departmental meetings and increased demand on the part of students for more rooms.

Moved 12 computer stations from the 3rd floor and placed them on carts for use in the 4 person group study rooms on Level 2.

After the resignation of both part-time supervisors, advertised and hired two new supervisors early in January 2009.

Updated the student handbook and placed the information on a wiki in preparation to creating a Blackboard Community, eliminating the need for notebooks to be located at each of the desks.

Conducted tours of the IC for various community, library and academic groups. Groups included visitors from Europe and ranged in size 1-25 participants. The IC continues to receive requests to tour the building focusing the services provided by the Library and ITS and the environmental aspects of the building.

Worked with the Writing Center to better utilize their space in the IC and in late fall 2008, Blackboard Faculty support began to use the space in the mornings, meeting with faculty needing assistance with Blackboard.

Worked with Jeannette Pierce to seek out campus partnerships to create a vibrant library programming schedule that reflects a learning commons philosophy.
  o Midday Music was scheduled in the spring in conjunction with Loyola’s Department of Music.
  o Environmental Film Series was established and during the school year several films were shown, followed by discussions. The partner in this endeavor included CUERP, SEA and other environmental campus groups.
  o Piloted a contest called the Spring Fling, encouraging student organizations to attend library/IC programs. The prize was a party hosted by the Library on the 4th floor of the IC. While participation was low, it did provide insights for future ideas and possible collaborators.

Worked with ALA’s LLAMA Division to coordinate a pre-conference for the July 2009 Annual Conference. Presenters included key Loyola Library/ITS, facilities staff and the architects involved in planning and building the IC. Approximately 40 librarians and architects attended the all day conference and comments received from the participants indicated that the information was useful and practical.

Planned an open house for ALA’s annual conference. Approximately 25 librarians attended the open house, held on July 12 in the IC and hosted by the Dean and Director.

Reviewed and updated the MOU.

Worked with the IC Steering Committee and the monitor to update the Community Access Policy.

Implemented the use of the Digital Signage by Library/ITS staff to advertise events that were specific to the Library and Information Commons.
Worked with Anne Reuland and Heather McNitt to arrange for building signage to direct users to classrooms, restrooms, etc.

- Added additional recycling bins to encourage students to use these for their paper and plastic products.
- Worked with Facilities to address building related issues, such as leaks, door closures, soundproofing the 3rd floor, etc.
- Added extra printers to the different floors to meet increased demand. This included the addition of a new color printer.
- Studied usage of the building to determine optimum staffing levels. As a result, it was decided to decrease staffing on Level 3 during the summers and breaks.

Statistics (July 08-June 09)

- Gate counts: 274,047
  (This number does not reflect the gate counts for Cudahy Library (July 08-Dec 8) and currently the 2009 months of February, March and June are unavailable)

- Building Usage (January 09-June 09) Sample Statistics (based on head counts conducted by IC staff):
  - 8am: 390 daily average number of users on the computers
  - 2pm: 1931 daily average number of users on the computers
  - Midnight: 698 daily average number of users on the computers
  - 8am: 107 daily average number of users sitting in chairs (not on a computer)
  - 2pm: 768 daily average number of users sitting in chairs (not on a computer)
  - Midnight: 231 daily average number of users sitting in chairs (not on a computer)

(These numbers reflect just a small snapshot of the ways the students use the building on any given day. For statistics broken down by day, time of day, use and location, please look at the shared drive folder: IC Statistics for more detail.)

- 4th Floor events (including: meetings, multi-day conferences, receptions and lectures)
  - February: 11 events
  - March: 26 events
  - April: 17 events
  - May: 8 events
  - June: 20 events

- Tours:
  - 31 tours conducted averaging 1-2 hours
  - 183+ participants

- Group Study Room reservations (32 rooms):
  - Total made: 20,749 (On average 56 reservations made daily)
  - Total hours reserved: 38,505
  - Group Study Reservation page views: 287,000

- Website Visits:
  - Total page views: 563,731
  - Total visits: 335,800
  - Average time on the site: 2 minutes 45 seconds
- New visit ratio: 65.69%

- **Computer usage:**
  - Total number of logins: 489,057 (9400 logins weekly)
  - Total number of laptop checkouts: 40492 (778 checkouts weekly)

**Goals for the Upcoming Year**

- Work with the Learning Commons Taskforce to incorporate the learning commons philosophy into the daily operations, strategic directions and services provided by the Information Commons.
- Work with Library departments to further integrate the IC into the daily operations of the Library and help the campus see the IC as part of Loyola University Libraries.
- Seek out campus organizations interested in working with the Library/IC to provide academic programs and services to the Loyola Community.
- Continue to revise the 4th floor and classroom reservation process and the usage polices.
- Explore the possibility and feasibility of an automated scheduling system.
- Create an IC FAQ page.
- Explore ways to promote and publicize the programs and services available to students in the IC.
- Continue to explore ways to utilize the space to create areas that meet the variety of ways users make use of the space for academic and social purposes.
- Explore how to best utilize the space in the Digital Media Lab to meet the growing demands of the user population.
- Streamline the process of maintaining the digital signage in the IC.
LEWIS LIBRARY FY09
Prepared by Yolande M. Wersching, Head of Lewis Library

Departmental Goals for the past year & Status

- Work with Cataloging department to get report of multiple copy titles in Lewis collection and consider withdrawing extra copies In Process
- Continue to withdraw/store bound/microfilm journal titles that are available in online format In Process
- Shelf read collection including Curriculum, Reference, Main Stacks and Bound Periodicals Done
- Recruit, hire and train new Reserves Associate Done. Aparna Ghosh hired September 2008
- Recruit, hire & train new Evening/Weekend Supervisor Done. Annette Alvarado hired August 2008
- Acquire laptop computers for checkout Done. 10 laptops purchased for Lewis September 2008
- Select location and furniture for laptop storage Done. Storage cart purchased September 2008
- Consider purchase of new chairs for Reference public workstations (to match chairs at Group workstations) Done. New chairs purchased January 2009
- Purchase & install 2 Pegasus-only terminals on 8th & 9th floors Incomplete. Waiting for Library Systems and ITS to provide suitable terminals.
- Purchase Webcams for staff to participate in meetings with colleagues from other campuses Done. All Lewis Librarians have webcams.

Projects completed & other highlights

- All Lewis Library staff participated in “23 Things” & most completed all 23.
- Wireless access units added on 9th floor.
- Vanessa Crouther prepared prototype format for internal Library Newsletter which is now being used.
- Kristina Schwoebel and Yolande Wersching participated in the University Service Project at the Chicago Jesuit Academy.
- Kristina Schwoebel assumes subject specialist responsibilities for Mathematics and Natural Science departments.
- Prepared and presented departmental presentation of Lewis Library to all library staff.
- Susan Wardzala & Yolande Wersching participated & presented at Carthage College orientation for Social Work students.
- Taya Franklin assumes subject specialist responsibility for School of Communication.
- Reduced reliance on paper by sending articles electronically and by sending TIF files to fulfill requests. Trained Cudahy Access Services staff to do same.

**Basic Statistics on work completed and/or patrons served**

<table>
<thead>
<tr>
<th>Service</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserves</td>
<td>+4%</td>
</tr>
<tr>
<td>Instruction Services</td>
<td>+39%</td>
</tr>
<tr>
<td>Instruction Patrons</td>
<td>+39%</td>
</tr>
<tr>
<td>Turnstile count</td>
<td>-26%</td>
</tr>
</tbody>
</table>

**Departmental Goals for 2008-2009**

- Purchase new computers for staff and service desks
- Purchase new printers for public workstations with duplex capability
- Re-furbish 137 chairs with new foam and fabric covers
- Investigate possibility of ITS assuming responsibility for maintaining public printers
- Purchase & install Receipt Printer at Circulation Desk
- Purchase and install two (2) monitor arms – one each for Circulation and Reference service desks
- Track circulation of Reserve materials & laptops electronically (by using a program similar to LibStats)
- Complete inventory of Test Kits
- Complete weeding of duplicate titles from collection
Reference Department Responsibilities

The Reference Department supports research, teaching, and learning at Loyola University Chicago by providing the following services to students, faculty, and staff.

**Reference and Instruction Services, including**
- Reference desk service, in-person and by phone
- Reference e-mail service
- AskLive AJCU chat reference service
- General instruction and workshops
- Creation of general subject guides

**Liaison Services to Academic Departments, including**
- Subject librarians to respond to reference questions and other questions related to the Libraries’ collections and services
- Consultation service (Reference-by-Appointment)
- Communication with academic departments about the library’s collections and services
- Creation of subject guides highlighting important resources

**Collection Development and Management, including**
- Selection of materials in all formats for the reference collection
- Selection of materials in all formats for the general collections
- Contributions to collection management projects
- Management of the government documents collections
- Co-management of electronic resources with Serials and Electronic Resources

**Staffing in FY09**

The Reference Department had quite a few personnel changes in FY09. In August 2008, the Department welcomed Jane Currie to the Department as our new Reference Librarian and Bibliographer for Theology, Philosophy, Classical, and Islamic World Studies. In the same month, we said goodbye to William Cuthbertson, Government Documents Librarian, who moved on to a new position as Government Documents Librarian at Miami University Ohio. In September 2008, Sherri Saltzman, Reference & Electronic Resources Librarian, left the Reference Department to become the Libraries’ Serials and Electronic Resources Librarian. We began the Fall semester with four full-time librarians. Fortunately, the Libraries provided financial support to hire a part-time librarian, James MacDonald, to assist with reference desk hours, allowing us to maintain our regular reference desk and instruction services. We were pleased to hire James MacDonald as a full-time Reference Librarian/Bibliographer beginning January 2009. The Department requested and received support to hire a part-time librarian, Jennifer Schwartz, from April – June 2009 while the Head of Reference took leave for maternity. The Reference Department is grateful to Leslie Haas for serving as Acting Head of Reference during the same time period. Finally, we were happy to welcome Tara Radniecki as our new Reference and Electronic Resources Librarian in May 2009.
Personnel:

- **Head of Reference (faculty)**, Jeannette Pierce
  - Reference Assistant (full-time staff), Brenda Overton
  - Supervises graduate assistants (4-6 hourly)
  - Supervises government documents assistant (part-time staff), Eileen Black
- **Reference/Bibliographer (faculty)**, Stephen Macksey
- **Reference/Bibliographer (faculty)**, Niamh McGuigan

Members of the Reference Department served on the following library committees in FY09:

- Assessment Committee: Stephen Macksey, Niamh McGuigan
- Bibliographers Group: all librarians
- Collection Development Steering Committee: Jeannette Pierce
- Electronic Resources and Periodicals Committee: Jeannette Pierce, Tara Radniecki
- Emerging Technologies Committee: Jane Currie
- IC Steering Committee: Jeannette Pierce
- Interlibrary Loan Search Committee: Niamh McGuigan
- Learning Commons Task Force: Jeannette Pierce, Jane Currie
- Mentoring Program Committee: Jeannette Pierce
- Mission & Visions Task Force: Jeannette Pierce
- Rank & Promotion Task Force: Stephen Macksey, Jeannette Pierce
- Reference and Electronic Resources Search Committee: Jeannette Pierce, Niamh McGuigan
- Staff Development Committee: Brenda Overton
- Sustainability Task Force: Jane Currie
- Voyager Steering Committee: Jeannette Pierce
- Web Team (Library): Niamh McGuigan

Members of the Reference Department served as bibliographer/liaison librarians for the following areas in FY09:

- Stephen Macksey -- Black World Studies, Chemistry, Nursing, Physics & Psychology
- Niamh McGuigan -- English, Modern Languages & Literatures, Communications
- Jane Currie -- Bibliographer for Theology, Philosophy, Islamic World Studies, and Classical Studies
- James MacDonald -- Bibliographer for Political Science, Sociology, International Studies, Peace Studies and Government Documents Librarian

**Highlights for FY09**

The work of the Reference Department during the past year highlights the commitment of each individual member of the Department to providing excellent public and liaison services. Staffing challenges required every member of the department to take on extra responsibilities that included training of new staff, additional reference desk hours during the week and on weekends, and extra instruction sessions. We are proud that we maintained our regular reference desk schedule and instruction levels in FY09. Training new
people required a significant amount of time throughout the year as we hired new librarians (Jane Currie, Jamie MacDonald, Tara Radniecki) and part-time librarians (Jamie MacDonald, Jennifer Schwartz). In addition, we were thrilled to train and work with two MLS students during the past year. Susan Hanf from the University of Wisconsin-Madison completed a semester-long practicum with us in Fall 2008 and Joseph Goetz from the University of Illinois, Urbana-Champaign, completed a week-long Alternative Spring Break program with us in March 2009.

In FY09, the Department reorganized to focus more attention on some of our day-to-day responsibilities. Niamh McGuigan assumed primary responsibility for reference desk needs, particularly training of new people working at the desk and communicating necessary information to people working at the desk. Jane Currie assumed primary responsibility for the managing the day-to-day needs of the reference collection, including sharing information about new reference books, managing the new reference book display, ensuring that shelving is completed regularly, and managing projects as needed. Both Jane and Niamh can be commended for their good work in these new roles.

LibGuides continued to absorb significant time and attention in FY09. Members of the Reference Department initiated discussions about the need for some standardization across all of our guides which resulted in a more cohesive look and some shared content for all guides. We have all been busy updating existing guides with new content and creating new guides.

Finally, the Reference Department worked closely with the Director of the Information Commons, Leslie Haas, to create a program of activities for the Spring Semester. Every librarian in the Department contributed to programming efforts by conducting workshops, hosting film viewings, and/or creating content for the resource of the week promotions. Jane Currie served as a primary point of communication between the Libraries and Office of Student Activities and Greek Affairs, our primary partner getting the word out to students about our activities.

Statistics for FY09

The Reference Department collects statistics related to service at all service desks, away from the desk reference statistics by individual subject specialists, Reference-by-Appointment (RBA) statistics, as well as instruction statistics.

Reference Desk and Subject Liaison Reference

The Reference Department initiated the use of LibStats to track statistics by type of assistance provided. Reference and Extended Reference statistics refer to information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs, with the extended reference statistics reflecting those transactions that involve working on a single question for more than 5 minutes, usually involving more than one information resource. In addition, the Department tracks statistics that relate to exchanges that provide assistance with general information such as locations, schedules, equipment, and supplies.

According to the statistics over 50% of reference questions in the Cudahy Library and Information Commons were not asked or answered at the reference desk. In addition, there was a sharp decline of over 60% in total reference questions recorded from FY2008 (14,452 reference questions) to FY2009 (5,618 reference questions). Some of the decline can be attributed to the closure of the Cudahy Reference Desk at a busy time of year when LibStats was still new to all of the service desks. We will be interested to see if there is an upward change in the statistics in FY2010.
Questions by Type:

<table>
<thead>
<tr>
<th>Location</th>
<th>LSC Reference Desks</th>
<th>Lewis Reference Desk</th>
<th>Librarian’s Office</th>
<th>Other Service Desks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference</td>
<td>1641</td>
<td>2683</td>
<td>799*</td>
<td>2726</td>
</tr>
<tr>
<td>Extended Reference</td>
<td>1132</td>
<td>347</td>
<td>195</td>
<td>195</td>
</tr>
<tr>
<td>Total</td>
<td>2773</td>
<td>3030</td>
<td>1459</td>
<td>2921</td>
</tr>
</tbody>
</table>

*Not able to distinguish between reference and extended reference for librarian’s office statistics in FY09.

Reference will work with the Associate Dean and Head of Access Services to in the coming year to provide additional reference and referral training for Circulation Desk staff. The good news in the statistics is that the vast majority of extended reference questions were handled by reference staff. However, the concern remains for the coming year whether appropriate questions will reach reference staff and whether patrons are aware of the location of reference service in the Information Commons.

**Instruction and Reference-by-Appointment Statistics**

Members of the Reference Department devoted significant time to preparing relevant, meaningful instruction to help ensure student success in their classes and have a positive impact on information literacy at Loyola University Chicago. Approximately one half of our instruction is course-related and conducted by the appropriate subject librarian. In addition, the librarians share responsibility for meeting with sections of the University College Writing Seminar (UCWR), as well as providing sessions for other general programs on campus such as the LEAP (Learning Enrichment for Academic Progress) Program held each summer.

Reference Librarians continue to meet with students and faculty one-on-one to assist with specific research needs through our Reference-by-Appointment (RBA) service. RBA’s are generally scheduled for one hour and often require preparation or follow-up on the part of the subject librarian.

Despite our staffing shortage in FY09, we conducted 40 more instruction sessions and 20 more workshops in than in FY08. However, our number of RBAs dropped by 48. We believe the drop resulted from having two less librarians to conduct outreach and help with scheduling of our many commitments.
Lake Shore Campus Statistics

<table>
<thead>
<tr>
<th>Session Type</th>
<th>Number of Class</th>
<th>Participants</th>
<th>Teaching Time (hour)</th>
<th>Preparation Time (hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>242</td>
<td>124</td>
<td>237.83</td>
<td>208.92</td>
</tr>
<tr>
<td>Orientations</td>
<td>6</td>
<td>124</td>
<td>5.75</td>
<td>7.50</td>
</tr>
<tr>
<td>RBA</td>
<td>215</td>
<td>254</td>
<td>214.42</td>
<td>141.75</td>
</tr>
<tr>
<td>Tour</td>
<td>1</td>
<td>40</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Workshop</td>
<td>36</td>
<td>370</td>
<td>34.75</td>
<td>32.00</td>
</tr>
</tbody>
</table>

See Appendix A for all instruction statistics.

Reference Goals for FY09

Reference and Instruction Services

- Continue to work with the Associate Dean and the Director of the Information Commons to create appropriate reference staffing for the Cudahy Library and Information Commons.
- Move to a single point of reference service in the Information Commons in Spring 2009 - - We closed the Cudahy Reference Desk in Fall 2008, earlier than anticipated. The actual physical desk was removed in December 2008 and the ready reference collection moved to IC Level 2 during holiday break.
- We experimented with two service models on IC Level 2 in FY09.
  - During the fall semester librarians staffed the Research Consultation Office during librarian desk hours and graduate assistants staffed the IC Level 2 desk with an undergraduate IC student. The primary benefit of this staffing model was that librarians were seen as providing a very high level of service. Students appreciated the opportunity to work one-on-one with a librarian in a private, comfortable space. In addition, the use of the Research Consultation Office allowed the librarian to incorporate more instruction into the reference interaction. The weakness of this model was that librarians were not as visible on the floor and were less aware of what was happening at the IC Level 2 desk.
  - In January 2009, librarians worked with graduate assistants at the IC Level 2 desk during the day and staffed the Research Consultation Office in the evening. The primary benefit to this model was that the librarians were more visible at the reference desk. An added benefit is that the consultation office could be used for our Reference-by-Appointment (RBA) service during regular business hours. The weakness of the model was that the tall, public desk is not conducive to providing in-depth reference consultations and it was difficult to schedule appointments for more in-depth assistance.
- Develop marketing and signage about reference service in the Information Commons with the goal of increasing desk statistics by 10%.
  - Created digital signage to promote reference service on Level 2 of the Information Commons + stressed importance of referrals from other desks. However, we continued to see a decline in reference questions asked at the reference desk in the Information Commons. See Appendix B for digital signage examples.
- Discussion about where and how to best provide “just-on-time” reference services now and in the future occurred frequently in the past year and will continue.
- Implement IM as the primary tool for communication between service desks.
  - GroupWise IM is working well as a communication tool between service desks.
- Implement IM as a reference service medium.
  - This was not completed in FY09. We are set to implement a local IM reference service using Library h3lp open source software in Fall 2009.
Contribute to the development of new instructional material for the web site with an emphasis on using multiple technologies such as screen casting and pod casting. Work with the Digital Media Lab and the Emerging Technologies Committee to accomplish this goal.

- No accomplishments to report for FY09. Our staffing level was low most of the year and there were a number of competing priorities that left little time to experiment with these technologies.

Recommend to faculty that they include library resources directly into Blackboard course pages by including links to subject and/or course-specific LibGuide pages.

- In year one, we would like each librarian to report that 3-5 courses have included links to subject and/or course-specific LibGuides in BlackBoard courses.
  - Librarians asked faculty members in their liaison areas to include contact information and links to relevant LibGuides in Blackboard course pages and received some feedback regarding a positive response to this effort.
  - Librarians will each create 2 course-specific LibGuides in FY09.
    - Jane and Niamh added five course specific guides to their LibGuides.
  - Head of Reference will develop a means to track librarian contributions to Blackboard Courses.
    - This was not done. At present, we do not have a reliable means to track librarian contributions to Blackboard courses.

Pilot the use of LibStats, an online tool for collecting reference desk statistics, at all reference and information desks in Fall 2008.

- We implemented LibStats across all service desks, including the circulation desks at Lewis and Cudahy in Fall 2008.
- Public Service Heads met in Spring 2009 to review and revise statistics needs for 2010 and revise question type definitions.
- Staffing at all levels expressed that they like using LibStats to record questions and have found it useful to be able to browse and search previously recorded questions.

Liaison Services to Academic Departments

- Increase reference/liaison contributions to the LOCL Blog by encouraging each liaison librarian to contribute two Blog entries per month.
  - Several librarians in the Department made regular contributions to the LOCL Blog.
- Continue to improve content and appearance of library subject guides. Work as a group to standardize some aspects of appearance and organization.
  - LibGuides continued to be a priority project in FY09. Librarians contributed to discussions that led to new guidelines for the appearance and organization of the library subject guides and began implementing required changes.
  - Librarians continued to revise existing LibGuides and create new LibGuides in FY09. Reference Librarians are currently responsible for the creation and management of 36 of the 68 published guides.
- Librarians regularly reach out to faculty and students in their liaison departments by e-mail, individual meetings with faculty, and attending departmental meetings or events.
- Review distribution of liaison responsibilities to incorporate new staff.
  - Worked with Associate Dean to assign liaison areas when new librarians hired.
- Each liaison librarian will attend 1-3 liaison department events each semester to further our goal of creating good relationships with the academic faculty.
  - At present, we do not have a good way to track this type of activity. However, librarians continually seek out activities that allow for informal contact with members of liaison departments.
Collection Development and Management

- Continuously review the print reference collection to ensure that outdated editions are removed and to look for opportunities to move core reference titles to electronic versions.
  - We continue to emphasize online purchases for the reference collection.
  - New editions are flagged to indicate need to pull older editions when shelving.
- This year, we were excited to add access to Reference Universe as a central point of access to print and electronic reference materials.
- Jeannette shifted day-to-day management of the reference collection to Jane Currie in Spring 2009.
- Completed a clean-up of the entire reference collection.
  - Worked with Anne Reuland to create “quick reference” dictionary stands for each floor in the Cudahy Library.
- Continue to work with the Head of Monograph Acquisitions to create a database of print reference titles that can be used to record retention decisions. -- We did not pursue this goal in FY09.
- Contribute to a review of the libraries’ electronic resources.
  - Librarians commented on trials and participated in group discussions about electronic resources as needed.

Electronic Resources Librarian

- Review all licensed databases to ensure that sites are customized to fit patron needs and include appropriate branding for Loyola University Libraries.
  - Not accomplished due to position not being filled until May 2009.
- Market electronic resources using the Libraries’ digital signage and the LOCL Blog.
  - Librarians did contribute new database announcements to the LOCL Blog throughout the year. We did not use the digital signage for this purpose in FY2009.
- Work with the Associate Dean to hire a new Electronic Resources Librarian. Sherri Saltzman’s last day will be September 9th.
  - Conducted an extended search and hired Tara Radniecki to begin work in May 2009.

Illinois and Federal Documents Collections

- Continue relabeling and reshelving of the Illinois State documents. – Done.
- Continue weeding all state and federal documents holdings. – Done.
- Continue to inform librarians about important government publications by sending out topical e-mails. – Jamie began working with individual librarians to review collections related to liaison responsibilities.
- Work with the Associate Dean to hire a new Government Documents Librarian. Bill Cuthbertson’s last day will be August 29th. – Hired James MacDonald in January 2009.
- Investigated move towards an e-only depository collection.
- Met with Associate Dean several times between January and June to discuss future directions for our depository receipts and existing print collection.

Other Accomplishments

- The Department hosted a MLS Practicum Student from the University of Wisconsin-Madison in Fall 2008. Susan Hanf worked under the direction of Jeannette Pierce to complete a new LibGuide for Public History as part of her practicum, which also included extensive reference desk training and practice.
- The Department hosted a MLS Alternative Spring Break student from the University of Illinois Urbana-Champaign for one week in March 2009. Joseph Goetz worked under the direction of Niamh McGugian on a Shakespeare LibGuide for the Libraries.
- Moved to new office space in Spring 2009.
- Worked with PR Committee to create Faculty Liaison Brochure.
- Completed project to clean and neaten reference collection.
- Hired and trained three new librarians in FY09.
Reference Goals for FY10:

In 2010, the Reference Department will:

1. Focus on using new technologies to expand and promote reference and research services.
   - Work with Lewis Reference to implement IM Reference using the LibraryH3lp open source software.
   - Work with Lewis Reference to implement Text-A-Librarian service.
   - Work with the PR Committee to promote reference services.
     - Create video podcasts describing reference desk service and research consultation service.
     - Continue to use digital signage to promote reference services.
2. Incorporate Loyola Queue for the AskLive Virtual Reference Service into regular reference work flow on the Lake Shore Campus.
3. Work with Chulin Meng to create more standard reports from LibGuide data.
4. Work with Chulin Meng to revise instruction statistics database based on input from librarians.
5. Hold regular meetings with reference librarians at Lewis.
7. Review reference print standing orders to determine if titles can be cancelled or moved online.
8. Develop a timeline and weeding guidelines for reducing existing print reference collection. We would still like to develop a database of print reference materials, similar to that used for the Lost Book List, to serve as the primary tool for organizing a large-scale weeding project. Developing the database would require that we work with Ling-Li Chang and Chulin Meng.
9. Develop new feedback and assessment tools for library instruction and inclusion of library resources in Blackboard courses.
10. Continue to update existing LibGuides and develop new LibGuides of value to the Loyola community.
11. Continue to work with Library Administration to determine next steps in redefining our government documents collection and our role as a depository library.
12. Contribute towards the shift to a Learning Commons philosophy by creating and implementing programming that highlights the value of the Libraries’ resources, services, and spaces to the campus community.
13. Continue to work closely with IC and IT staff to ensure consistent training for all staff working in the Information Commons facility.
15. Continue to monitor the use of LibStats as a tool for collecting and analyzing service desk statistics. Investigate commercial services, such as Compendium’s Desk Tracker as an alternative to LibStats.
16. Continue to build our online reference collection and explore how to make this type of material more visible to our students.
## Appendix A

### Instruction Stats (July 1, 2008 - June 30, 2009)

#### All Sessions

<table>
<thead>
<tr>
<th>Session Type</th>
<th>Number of Class</th>
<th>Participants</th>
<th>Teaching Time (hour)</th>
<th>Preparation Time (hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>292</td>
<td>5595</td>
<td>287.67</td>
<td>234.25</td>
</tr>
<tr>
<td>Orientation</td>
<td>26</td>
<td>940</td>
<td>19.42</td>
<td>18.75</td>
</tr>
<tr>
<td>RBA</td>
<td>381</td>
<td>428</td>
<td>358.58</td>
<td>209.67</td>
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<tr>
<td>Tour</td>
<td>4</td>
<td>54</td>
<td>1.75</td>
<td>1.75</td>
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<tr>
<td>Workshop</td>
<td>45</td>
<td>425</td>
<td>43.50</td>
<td>37.00</td>
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#### Cudahy Librarians Only

<table>
<thead>
<tr>
<th>Session Type</th>
<th>Number of Class</th>
<th>Participants</th>
<th>Teaching Time (hour)</th>
<th>Preparation Time (hour)</th>
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</thead>
<tbody>
<tr>
<td>Instruction</td>
<td>242</td>
<td>4557</td>
<td>237.83</td>
<td>208.92</td>
</tr>
<tr>
<td>Orientation</td>
<td>6</td>
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<tr>
<td>RBA</td>
<td>213</td>
<td>254</td>
<td>214.42</td>
<td>141.75</td>
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<td>Tour</td>
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<tr>
<td>Workshop</td>
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<td>379</td>
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#### Lewis Librarians Only

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<th>Session Type</th>
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<td>Orientation</td>
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<tr>
<td>Workshop</td>
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<td>8.75</td>
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#### UCWR Sessions (Exclude RBA’s)

<table>
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<td>Cumle, Jane</td>
<td>41</td>
<td>761</td>
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<td>Franklin, Taye</td>
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<tr>
<td>Hass, Linda</td>
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<tr>
<td>McDonald, Janie</td>
<td>11</td>
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</tr>
<tr>
<td>Macksey, Stephen</td>
<td>12</td>
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<tr>
<td>McGaugan, Nanh</td>
<td>27</td>
<td>427</td>
</tr>
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<td>Pierce, Jeannette</td>
<td>9</td>
<td>156</td>
</tr>
<tr>
<td>Ruppman, Tracy</td>
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<td>31</td>
</tr>
<tr>
<td>Schwoebel, Kristina</td>
<td>3</td>
<td>51</td>
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</tbody>
</table>
Appendix B

Digital Signage:

Ask a Librarian!
We're on the 2nd floor of the Klarchek Information Commons.
We know the good stuff.

Starting a Research Project?
Talk with your librarian!
We're on the 2nd floor of the Klarchek Information Commons.

What's the best kept secret on campus?
Librarians work with you 1-on-1
Try it. We're on the 2nd floor of the Klarchek Information Commons.
Technical Services Division

It is my pleasure to prepare an executive overview of the accomplishments and challenges of the Technical Services Division at Loyola University Libraries for FY2009. The two departments that make up the division: Monograph Acquisitions & Cataloging Department led by Ling-li Chang and Serials and Electronic-Resources Management (SERM) Department led by Martha Spring had an outstanding year with a significant number of planned goals accomplished and unforeseen challenges effectively identified, addressed and resolved. Technical Services successfully completed four recruitment efforts, initiated cross-training within the departments, and evaluated and revised existing procedures and work flows to take advantage of new capabilities and improved technology. Some reorganization was initiated to make the operations and duties more rational, workloads more equitable and backup possible. Technical Services successfully completed the Lewis Library Weeding Project, updating the Voyager records for materials that were withdrawn or relocated to the Library Storage Facility. I am grateful for the fantastic team of librarians and library staff that the division has assembled.

Monograph Acquisitions and Cataloging Department - Ling-li Chang

The Monograph Acquisitions and Cataloging Department completed another successful year filled with new initiatives and accomplishments. Among the many highlights were successfully filling vacant positions, training promoted and new staff members, creating and implementing new procedures for accrual book orders, implementing two collection assessment tools and improving the Voyager database.

FY2009 was the first year that the Monograph Department took full advantage of the accrual book ordering program and the new procedures, developed earlier by Ling-li and her staff, proved successful. The monograph acquisitions unit also acquired and implemented, with the collaboration efforts from the Head of Systems and the Subject Specialists, two collection assessment tools to compare, analyze and evaluate Loyola’s library collection with peer institutions. These analysis tools identified gaps within Loyola collections resulting in the purchase of over 200 new titles to enhance the libraries’ print collection. In addition to providing Gobi training to new Subject Specialists, the acquisitions staff held question and answer sessions to provide broader understanding of acquisitions operations to the subject selectors. During the year the department also engaged in several important Voyager database improvement projects, including deleting out-dated reserve records and canceled purchase orders and correcting erroneous name headings. During FY09 the department worked on projects that increased the presence of e-books in Pegasus, the library’s catalog; provided catalog access for the Women and Leadership Collections; and enhanced the catalog records for award winning
children books. During February and March, Ling-li led the cross-campus Voyager Technical Services group and coordinated the upgrade activities for Voyager staff clients and Gary Strawn’s Voyager applications, including implementing and testing new and improved release features. Even as the new release was being tested and evaluated, the Cataloging Unit partnered with Access Services to change the location of over 3,400 microfilm and microfiche records from Cudahy to the Library Storage Facility. The department reviewed and evaluated new services and tools as they became available and implemented them as appropriate. In March the Monograph Department began using the libraries’ primary book vendor, YBP, to locate, catalog, and process out-of-print copies and take advantage of YBP’s cataloging and processing services. This new service reduced the number of individual procurement card orders. Also that month the cataloging staff started participating in the OCLC Expert Community Experiment to help improve the WorldCat database.

In addition to the major accomplishments listed above the Monograph Acquisitions and Cataloging Department maintained high quality work and efficiency in handling book order requests, receiving new books and DVDs, cataloging new books and maintaining accurate records of what the libraries own and where the collections are located.

**Serials and Electronic Resources Management Department – Martha Spring**

The Serials and Electronic Resources Management Department had a very successful year with many challenges and achievements. Position vacancies allowed for a review of staffing needs, processes and procedures resulting in the development of new workflows and improved operations. Several major electronic resource purchases were processed, departmental statistics were redesigned, a value assessment program for e-resources was implemented and the Electronic Theses and Dissertations Project moved forward.

One of the year’s highlights for the Serials and Electronic Resources Management Department was the preparation and production of an educational video for the library staff. Over several months, the department brainstormed, wrote scripts, and filmed the video. In addition to producing an informative film, the group enjoyed an excellent team building experience and recognition among their colleagues. Several major electronic resource purchases were processed by SERM, including the Gale digital databases, which represented an unexpectedly major project. Billing issues with the ARTstor database, which included coordinating with the provider and Loyola’s Fine Arts Department, were resolved.

Journal packages continued to be transitioned from print or print + online to online only. Licenses for new e-resources were negotiated and networked services contracts were established to provide the broadest service to Loyola users. Another major project for SERM this year was developing a value assessment program for library e-resources which included reviewing, evaluating, recommending, and implementing Serials Solutions COUNTER, a product that identifies how much each
e-resource is being used, including cost-per-use data. Departmental statistics were redesigned to improve turnaround time and offer more accurate results for various administrative statistic queries. Access to electronic resources continued to play a major role in cross-campus issues between University and Health Science Libraries and an E-Journal Summit was held to facilitate and implement an action plan to improve access and understanding of jointly owned e-resources. Cooperation and partnership between the Library and the Graduate School resulted in significant progress with the electronic theses and dissertation project and the official start of electronic submissions is expected to begin in fall 2009.

In addition to the activities listed above, the Serials and Electronic Resources Department continued to strive to provide quality work in acquiring, cataloging and providing access to serials in all formats. The trend in increased electronic holdings required adding a layer to work flows in the department to reconcile records for print and online holdings.

**Technical Services Goals for 2009-2010**

**Monograph Acquisitions and Cataloging Department**

- Improve management of book budget and book purchase activities. Investigate and implement methods to facilitate more evenly distributed book spending throughout the year. Examine new title supply and other factors to help distribute adequate book funding among different subject disciplines. (summer-spring)
- Increase the presence of e-books in the Pegasus catalog.
  - Plan and batch load purchased MARC records for the Gale Digital Collections and for the NetLibrary MLNC Academic E-Book Collections into Voyager database. (summer-fall)
  - Plan and batch load MARC records for other existing e-book collections as time permits (spring)
- Determine what and how to display (present) government documents in Loyola’s catalog. (summer-fall)
  - Work with Government Document Librarian and other appropriate personnel
  - Investigate services offered by Marcive
- Participate in the faculty publication celebration project (summer-fall)
  - Locate and purchase clean monograph copies for the project.
  - Determine the special cataloging treatment to be given to the faculty authored books for the project.
  - Catalog the books at the end of the project.
- Participate in planning and implementation for the creation of one or more popular/recreational reading collections (fall-winter)
- Plan for and propose a foreign language material contract cataloging project (summer-fall)
  - Manage the project if it is approved. (fall-spring)
- Plan for and complete the following catalog maintenance projects
  - Withdrawal of government document titles weeded from the Lewis Library Collection in 2008
• Batch location change for former Science books and periodicals so that
will have the Cudahy location in the staff side of the catalog records. (fall-
winter)
• Participate in exploring and implementing new library service initiatives pertaining
to monograph acquisitions and cataloging: (a) new Pegasus design, (b) WorldCat
Local interface, and (c) electronic theses and dissertations project. (summer-
spring)
• Plan for and give a presentation on the Monograph Acquisitions and Cataloging
Department (winter-spring)

Serials and Electronic Resources Management Department
• Transfer selected Communications journals from Cudahy to Lewis (summer)
• Review current management processes for missing serial volumes with Access
Services and revise work flow as needed (summer)
• Implement updated procedures for managing local holding records for serials as
a result of discussions with Access Services (September)
• Develop and implement new work flows for the acquisition and cataloging of
electronic journals. (July, ongoing)
• Prioritize a visit to the HF Group’s bindery facility in Fall 2009
• Review and evaluate current work load of the Bindery Unit and investigate
reorganization opportunities (ongoing)
• Continue to refine and implement new Value Assessment procedures for
electronic resources (ongoing)
• Prepare for and work on new contracts for Elsevier Science Direct and
Wiley/Blackwell (January 2010)
• Investigate shared license with Health Science Library for Annual Reviews
(currently separate licenses without shared access), with January 2010 start date
• Officially implement ETD project (fall)
Monograph Acquisitions and Cataloging Department
Annual Report for FY09 (July 2008–June 2009)
Ling-li Chang, Department Head

The Monograph Acquisitions and Cataloging Department completed another successful year filled with new initiatives and accomplishments. Among the many highlights were filling vacant positions, training promoted and newly hired staff members, creating and implementing new procedures for accrual book orders, and improving the Voyager database.

The department was one staff member short for three months from August to October. We went through two recruitment efforts: first promoted Molly Mansfield to Monograph Acquisitions Associate and then hired Brigitte Anthony to fill Molly’s former job, Monograph Acquisitions/Rapid Cataloging Assistant. Training for Molly and Brigitte proceeded throughout the year.

FY2009 was the first year we actually handled the accrual book orders. The setups in the Voyager database and the new procedures created for them all worked out well.

After undertaking large cataloging and catalog maintenance projects three years in a row, it was a nice change in FY2009 when we were able to engage in several smaller in scale but much needed Voyager database improvement projects. For example, we cleaned up hundreds of records in Voyager for the out-dated course reserve materials and the canceled purchase orders and corrected many more erroneous name headings appeared in Voyager records in a given year. We also worked on projects to increase the presence of e-books in the Pegasus catalog, to provide access through online catalogs for the Women and Leadership collections, and to enrich the catalog records for award winning children books.

❖ Accomplishments from the Goals Set for FY2009:

- **Vacant Positions.** Filled the Acquisitions Associate position vacated on July 30th 2008 due to resignation of Andrea Gough. Promoted Molly Mansfield to Monograph Acquisitions Associate on September 15th 2008 and completed the training program for her for the new job responsibilities. Hired Brigitte Anthony on November 3rd to fill the Monograph Acquisitions/Rapid Cataloging Assistant position vacated by Molly. Completed training Brigitte on her acquisitions side of the job duties.

- **Acquisitions Q&A Sessions.** Held two Q&A sessions on August 6 and September 26, 2008 for subject specialists to gain better understanding of monograph acquisitions related topics.

- **Voyager Release 7 Upgrade (March 3-5, 2009).** Between February and March 2009, coordinated the upgrade activities for Voyager staff clients and for Gary Strawn’s Voyager applications. Learned and implemented new and changed features of the new software.
• **Course Reserve Record Cleanup.** Worked with the Cudahy and Lewis Reserve Services staff on course reserve record cleanup projects in July 2008. Nearly 6,000 out-dated reserve records were deleted from the Voyager database resulting from those projects.

• **E-Book Cataloging and MARC Records Batch Load Projects.** Completed a project and cataloged all 59 titles included in the Sage e-Reference Collection in January 2009. In June 2009 batch loaded 489 MARC records of the new titles added to the ALCS Humanities E-Book Collection. Also in June 2009 evaluated the MARC records purchased for the Gale Digital Collections and for the NetLibrary MLNC Academic E-Book Collections.

• **Voyager Database Maintenance.** Completed updating the Voyager records of the former Lewis books that were moved to Library Storage Facility as they were integrated with the rest of the LSF books. In total 23,400 former Lewis records were updated between July and November 2008 via batch change projects. In September 2008 updated the Voyager records for the outstanding 3,700 faculty selected Dewey books so that they can be accessible from the Pegasus catalog.

ıld Additional Accomplishments (Not Part of the Goals Set for FY2009):

• **First Year Book Fund Accrual Process.** Completed the first year with book orders accrued from the previous year. In the first two weeks of July 2008 assigned special budget lines to the accrual orders in Voyager so that the orders could be separately monitored and be paid for following a special set of Accounts Payable procedure throughout the year. Final report showing the final status of each accrual order was created and submitted to Accounts Payable Department at the end of June 2009. 170 of the 232 accrual orders were filled and paid for during FY2009 totaling $9,791.

• **Collection Assessment Projects.** Acquired access to two collection assessment tools: the Bowker Book Analysis System and the OCLC WorldCat Collection Analysis. Collaborated with Head of Library Systems, Collection Management Steering Committee, Subject Specialists and the two product vendors and implemented those tools. Resulting from the first round of Bowker analyses conducted by the subject specialists, 212 titles were purchased to enhance the libraries’ print book collection as of end of June.

• **Microform Relocation Project.** To facilitate the relocation of microfilm and microfiche titles from Cudahy to Library Storage Facility, changed the location of 3,400 Voyager records, cataloged 5 titles, reclassified 250 titles and re-labeled over 700 reels of microfilms between February and March 2009.

• **Cataloging Project for Women and Leadership Archival Collection.** In May and June 2009 participated in project planning and selection of a temporary cataloger for the project. Set up Voyager and OCLC Connexion systems for WLA. Reviewed and approved the catalog records created by the project cataloger. The six-week long project created a total of 60 collection level archival records in the OCLC WorldCat database.
• **Voyager Database Enrichment Project for Award Winning Children Books.** Between March and June 2009 collaborated with the Education Librarian and participated in a CARLI grant project which involves identifying the winners of 18 selected children’s book awards, adding award notes to their catalog records, and assessing the effect of the project by comparing circulation statistics before and after the project. Completed updating over 1,000 Voyager records to add award notes for the books we own. Created Voyager reports with the circulation statistics before the records were updated.

• **Voyager Database Maintenance Projects.** In January 2009 completed deletion of older purchase orders and their associated catalog records from the Voyager database. Between November 2008 and May 2009 investigated and updated 150 records which were shown as temporarily held on Science New Book Shelf. In March 2009 updated 325 Voyager records for the travel books held in the Rome Library to reflect their new shelving location.

• **New Services and Tools Explored and Implemented.** Began using our primary book vendor YBP to search for out-of-print copies in March 2009 to take advantage of their cataloging and processing services and reduce the number of procurement card orders thus free up staff time for other tasks. Introduced the Voyager “Pick and Scan” function to the Rome Library staff so that they can update Voyager records for straightforward relocations in May 2009. Learned and began participating in the OCLC Expert Community Experiment in March 2009, and upgraded and corrected master records in the OCLC WorldCat database.

**FY2009 Goals Not Completed:**

• Plan for and give a presentation about the Monograph Acquisitions and Cataloging Department. (Deferred to FY2010)

• Plan and execute batch location change projects for former Science books and periodicals so that they will have the correct Cudahy location in the staff side of the catalog records. (Deferred to FY2010).

• Work with appropriate individuals and groups to evaluate current policy for cataloging government documents and propose changes if necessary. (Began discussing and will continue in FY2010)
Key Statistics for FY09

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<th>FY09</th>
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<td><strong>Print Books</strong></td>
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<td>Total Print Book Orders Placed</td>
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<td>a) Purchase On Demand Books Orders</td>
<td>427</td>
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<td>b) Replacement Copy Orders</td>
<td>225</td>
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<td>c) All Other Orders</td>
<td>8,409</td>
<td>7,925</td>
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<td>Print Book Volumes Received</td>
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<td>Print Book Titles Cataloged</td>
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<td>Print Book Volumes Cataloged</td>
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<td>Print Book Titles Withdrawn¹</td>
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<td>Print Book Volumes Withdrawn¹</td>
<td>724</td>
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<td><strong>Books on Microform</strong></td>
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<td><strong>E-Books</strong></td>
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<td>E-Book Titles Ordered/Access Activated³</td>
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<td>Total E-Book Titles Accessible as of July 1, 2009³</td>
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<td>E-Book Titles Cataloged Individually</td>
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<td>E-Book Titles Cataloged via Batch Load Projects</td>
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<td>AV Items Received</td>
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<td>AV Titles Cataloged (by OCLC Contract Cataloging)</td>
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<td>AV Units Cataloged (by OCLC Contract Cataloging)</td>
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<td><strong>Catalog Database Maintenance</strong></td>
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<tr>
<td>Item Relocations, Reinstates, Corrections, Reclasses, etc.</td>
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<td>2,157</td>
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<td>Catalog Maintenance via Batch Change Projects</td>
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<td>Name, Series and Subject Heading Authority Work</td>
<td>21,273</td>
<td>15,924</td>
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Notes:

¹ FY08 statistics for print book titles and volumes withdrawn were very high because of the Lewis Weeding project.
² FY09 statistics for microform titles and units cataloged were resulting from the Microform relocation project. The department normally received no microform books to catalog.
³ E-Book orders and access statistics for FY08 were not tracked thus unavailable.

Goals for FY2010 (July 2009-June 2010)

1. Improve management of book budget and book purchase activities. Implement ways to facilitate more evenly distributed book spending throughout the year. Examine new title supply and other factors to help distribute adequate book funding among different subject disciplines. (summer-spring)
2. Increase the presence of e-books in the Pegasus catalog. Plan and batch load purchased MARC records for the Gale Digital Collections and for the NetLibrary MLNC Academic E-Book Collections into Voyager database. (summer-fall) Plan and batch load MARC records for other existing e-book collections as time permits. (spring)

3. Work with Government Document Librarian and other appropriate personnel to determine what and how to present government documents in Loyola’s catalog, including investigation of the services offered by Marcive. (summer-fall)

4. Participate in the faculty publication celebration project. Locate and purchase clean monograph copies for the project. Determine the special cataloging treatment to be given to the faculty authored books for the project. Catalog the books at the end of the project. (summer-fall)

5. Participate in planning and implementation for the creation of one or more popular/recreational reading collections. (fall-winter)

6. Plan and propose a foreign language material contract cataloging project. (summer-fall) Manage the project if it is approved. (fall-spring)

7. Plan for and complete the following catalog maintenance projects: (7a) withdrawal of government document titles weeded from the Lewis Library Collection in 2008, and (7b) batch location change for former Science books and periodicals so that they will have the Cudahy location in the staff side of the catalog records. (fall-winter)

8. Participate in exploring and implementing new library service initiatives pertaining to monograph acquisitions and cataloging: (8a) new Pegasus design, (8b) WorldCat Local interface, and (8c) electronic theses and dissertations project. (summer-spring)

9. Plan for and give a presentation about the Monograph Acquisitions and Cataloging Department. (winter-spring)

❖ Staff Changes

**NEW STAFF**

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<tr>
<th>Name</th>
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<tr>
<td>Brigitte Anthony</td>
<td>Monograph Acquisitions Assistant</td>
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**PROMOTION**

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<tr>
<td>Molly Mansfield</td>
<td>Monograph Acquisitions Associate (Promoted from Monograph Acquisitions Assistant)</td>
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**RESIGNATION**

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<th>Name</th>
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<th>Date</th>
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<tbody>
<tr>
<td>Andrea Gough</td>
<td>Monograph Acquisitions Associate</td>
<td>7/29/2008</td>
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Serials and Electronic Resources Management Department
Annual Report 2008-2009
Submitted by Martha Spring, Department Head

Summary/Highlights:

One of the year’s highlights for the Serials and Electronic Resources Management Department was the preparation and production of a department presentation for the library staff. We also posted and filled two positions in the department; everyone in the department participated in the interview and orientation process. The change in staffing inspired the examination and revision of existing procedures and work flows. Several major electronic resource purchases were processed this year, including Gale databases, which represented an unexpectedly major project. The Lewis project from last year was largely completed, with the withdrawal or relocation of materials to the Library Storage Facility. With fewer numbers in most areas of commercial binding, the Bindery unit made impressive progress with in-house repairs and theses binding.

Activities:

- **Department Presentation**: The Serials and Electronic Resources Management Department prepared a presentation video for the library staff. The goal was to provide an informative and educational session; the preparation also served as an enjoyable team-building experience for the department. Over several months, the department met to brainstorm, write scripts, and film the video. Josh Dumas was the director and edited the video as well. The presentation took place in May.

Personnel:

- The reconfigured position of Serials and Electronic Resources Librarian (formerly Preservation and Special Projects Librarian) was filled effective September 2008 by Sherri Saltzman. Transferring from the Reference Department, she retained bibliographer duties in several subject areas, and assisted the reference department by keeping up with some of her former job duties – including electronic access troubleshooting and bibliographic instruction – while her previous position remained open (through May 2009). She also participated in orientation and training of new Reference & E-Resources Librarian.
- The vacant position of Serials Acquisitions Assistant was posted in August 2008 and filled in November. While the position was vacant, remaining staff members learned the job and served as back-up in performing the duties of serial check-in and claiming. They continued check-in during Kate Dunn’s orientation and completed 48% of the total periodicals and 42% of microfilm checked in during the year.
**Departmental Statistics:**
- Discussed, revised and documented work flows in serials acquisitions and trained new serials acquisitions assistant. Provided orientation and training to new Serials and Electronic Resources Librarian.
- Revised monthly department statistics forms: Serials acquisitions streamlined its monthly report forms and the department-wide monthly reports were revised with the objective of being better able to respond to various statistics queries from the library administration (i.e. calendar year statistics as well as fiscal year period statistics.)
- Statistics for claims generated and periodical replacement orders were significantly lower than in the previous fiscal year, due to the vacancy of the serials acquisitions position for four months. Microform withdrawals were much higher last year due to a cancellation & withdrawal project at Lewis Library.
- In order to better provide accurate numbers for official statistics such as NCES and ARL, Sherri used a newly-developed process to “deduplicate” the number of journals in the Serials Solutions database and provide a number of our unique e-journal titles.

**Electronic Resources:**
- Cross-campus e-resources issues: In May, the E-Journal Summit was held at Maywood with Logan Ludwig, Heather Cannon, Bob Seal, Fred, Tara Radniecki, Sherri and Martha Spring, with the goal of improving access to and awareness and understanding of cross-campus electronic resources. Prior to the meeting, Heather generated a list of journals with current access at LUHS but limited or no access at LUC. The result of the meeting was the creation of an action plan: to finalize the list of journal titles to accurately reflect journals without current holdings at LUC; to meet with and solicit Biology feedback on which titles needed for LUC current access; to write a synopsis of progress to date in cross-campus access; to write an FAQ and instruction sheet for the use of e-resources at Loyola; to send all this information to Bob and Logan, who will write a report at the end of summer/early fall for Loyola faculty.
- ARTstor: Billing issues with the subscription, acquired June 2008, were resolved. Coordinated initial payment between ARTstor and the Fine Arts. Dept., which paid for the initial 18 months of ARTstor.
- Participated in the negotiation and acquisition process for several major Gale databases (*ECCO, Making of the Modern World*, etc.). The resources were requested by Loyola’s Center for Textual Studies and funded by the Library, Provost, President and the School of Arts and Sciences. This acquisition included separate licenses for the perpetual access and hosting fee agreement; assisted Fred Barnhart in the coordination of the negotiation process. Performed an inventory of the physical backup (hard drives, CD-ROMs) for these databases.
- Value Assessment of E-resources: Participated in development of value assessment program for library e-resources: Sherri evaluated various products and recommended and implemented the Serials Solutions COUNTER product. Sherri and Martha contributed to discussions and a spreadsheet to be used for value assessment including data on price, cost per search, peer institutions data, among other factors.
- Acquisitions/Cataloging/Bindery: As a result of the Wiley/Blackwell merger, over 100 titles (formerly Blackwell) were transferred from print/online to online-only
subscriptions. As a result of the new Wiley pricing model, about 20% cost savings were realized by changing the format of these journals. A recataloging of the print version records of these journal titles was also completed.

- **Electronic Journal Maintenance:** Reviewed title and coverage information on library E-Journal list for several e-journal packages and made updates as needed (Cambridge, Oxford, Informa World, Wiley/Blackwell, Ingenta, etc.)

**Serials Acquisitions:**
- Investigated and set up paid subscription to Wilson *OmniFile Full Text Select* database, which was state-funded previous to July 2008.
- Transferred subscriptions from print to online for: Palgrave journals (7 titles); SRDS titles (5); as well as miscellaneous journals that changed publisher and format through the year.
- Reviewed and processed licenses for new electronic resources. For databases that were acquired through vendors with whom we already have licenses, only addenda to the existing license were required.
- Researched pricing for eighty-five bioscience journals for a potential Loyola program in response to a faculty request.
- Transferred 10-20 problematic standing orders to new vendors.

**Bindery:**
- Electronic Theses and Dissertations (ETD): Sherri continued working on the successful implementation of the Electronic Thesis Dissertation plan for Loyola. She coordinated with the Graduate School in setting up a trial period for ETDs via ProQuest’s administrative site over the summer, with an official start of electronic submissions expected to begin fall 2009. The School of Education has also begun implementation of their administrative site in June 2009 and will be requiring online submissions beginning in fall 2009.
- The Bindery took advantage of lower numbers in most categories of commercial binding to catch up with a backlog of in-house repairs. Especially noticeable was an 87% increase in pamphlets and a 57% increase in replacement pages; bound theses increased 48% over the last year.
- Christa Kileff invited Gerald Ward, Conservation Manager at HF Bindery Group to give an informational disaster recovery session on responding and stabilizing materials after a flood and identification & treatment of mold for the University Libraries.

**Serials Cataloging:**
- Lewis project: Continued weeding, relocation and retention updates for Lewis holdings to LSF, adapting split holdings policy for serials started previous year with Cudahy materials. Most of this project was completed in the previous year, hence the lower statistics in titles and volumes withdrawn during fiscal year 2009.
- Josh and Martha discussed work flows for serials cataloging in July 2008, in preparation for the orientation of the incoming Serials and Acquisitions Librarian.
- As part of the Wiley/Blackwell merger mentioned above, serials cataloging was done for over 100 journals, as well as the recataloging of cancelled print journals.
• Bound Journal Task Force: Under the direction of task force chair Anne Reuland, members of Access Services and SERM met to discuss and plan for the process of identifying journals that can be relocated and/or withdrawn to clear the Cudahy mezzanine for quiet study space. Sent list of Sage, JSTOR Complement title and volume numbers to Anne in May.
• Recataloged microform guides from Microform location to Cudahy Reference.

Faculty Mentoring Program:
• Sherri participated in the new Faculty Mentoring Program as a mentor to Jane Currie in September 2008; Martha started working as a mentor to Tara in May 2009.

Staff Changes:
• Ted Geerdink resigned as Serials Acquisitions Assistant, effective July 9, 2008.
• Sherri Saltzman hired as Serials and Electronic Resources Librarian, effective September 8, 2008.
• Katherine Dunn was hired as replacement to Ted Geerdink in the position of Serials Acquisitions Assistant, effective November 10, 2008.

FY09 Departmental Goal Status Report:
• Interview for, hire and train new Serials and Electronic Resources Librarian position. (Summer 2008): Completed; Sherri Saltzman was hired and started September 2008.
• Interview, hire and train new Serials Acquisitions Assistant to replace Ted Geerdink. (Fall 2008): Completed: Kate Dunn hired November 2008.
• Serials Acquisitions staff members train to perform Ted’s duties and cover check-in, claims, and replacement periodical orders while position empty (July-November 7): Done.
• Move Department Head into an office and prepare work space for new Serials and Electronic Resources Librarian (Aug.-Sept.): Completed September 2008.
• Investigate and institute possible improvements to EBSCO renewal process (Ongoing; partially done last year): Completed. Requested and obtained lower prepayments for several e-journal packages; participated in EBSCO’s new online e-journal package renewal process.
• Monitor and troubleshoot access to library electronic resources (Ongoing): Done on an ongoing basis; the time frame for specific problems ranged from a few minutes to problems that continued for weeks and required assistance from Systems and the campus ITS department.
• Investigate and implement new procedures and policies for the evaluation and acquisition of databases and periodicals (fall 2008): Largely completed: COUNTER module acquired and implemented; Martha and Sherri worked on value assessment spreadsheet development with Fred and Jeannette.
• Pending FY2009 budget, acquire new databases and periodicals to fill collection gaps (ongoing): Completed: With the help of a $260,000+ collection enhancement, the
library acquired quite a few new databases. A portion of the databases were acquired on a perpetual access basis.

- Participate in promoting awareness of electronic resources available to the Loyola community (ongoing): Participated in discussions within ERPC that resulted in the inclusion of promotional and marketing duties in the job description for the Reference and E-Resources Librarians. Subject Specialists who recommend new databases are also urged to write blog entries on approved resources for the Loyola Libraries web page.
- Coordinate investigation, evaluation and implementation of MARC record collection sets for addition to library catalog: Completed as possible; acquired MARC records for new Gale collections; records are pursued for newly purchased resources as part of the order process.

**Goals for FY10:**

- Transfer selected Communications journals from Cudahy to Lewis (Summer 2009)
- Discuss process for work flow with Access Services to handle missing serial volumes and develop workflow (Summer 2009)
- Implement updated procedures for handling of local holdings records for serials as a result of discussions with Access Services (September)
- Develop and implement new work flows for the acquisition and cataloging of electronic journals. (July, ongoing)
- Prioritize a visit to the HF Group’s bindery facility in September 2009.
- Review and evaluate current work load of the Bindery Unit and investigate reorganization opportunities (ongoing)
- Continue to refine and implement new Value Assessment procedures for electronic resources (Ongoing)
- Prepare for and work on new contracts for Elsevier Science Direct and Wiley/Blackwell (by January 2010)
- Investigate shared license with Health Sciences Library for *Annual Reviews* (currently separate licenses without shared access), with January 2010 start date.
- Officially implement ETD project (Fall 2009).
## Serials Adds / Withdrawals / Maintenance

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2009</th>
<th>FY2008</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serials titles added (exclude periodicals)</td>
<td>99</td>
<td>56</td>
<td>77%</td>
</tr>
<tr>
<td>Serials volumes added (exclude periodicals)</td>
<td>1153</td>
<td>1372</td>
<td>-16%</td>
</tr>
<tr>
<td>Periodical titles added</td>
<td>24</td>
<td>52</td>
<td>-54%</td>
</tr>
<tr>
<td>Periodical volumes added</td>
<td>2030</td>
<td>3775</td>
<td>-46%</td>
</tr>
<tr>
<td>Microform serial titles added (incl. periodicals)</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Microform serial units added (incl. periodicals)</td>
<td>242</td>
<td>273</td>
<td>-11%</td>
</tr>
<tr>
<td>Electronic Resource titles added</td>
<td>320</td>
<td>466</td>
<td>-31%</td>
</tr>
<tr>
<td>Electronic Resource units added</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Book titles withdrawn</td>
<td>4</td>
<td>3</td>
<td>33%</td>
</tr>
<tr>
<td>Book volumes withdrawn</td>
<td>154</td>
<td>264</td>
<td>-42%</td>
</tr>
<tr>
<td>Serial titles withdrawn (exclude periodicals)</td>
<td>96</td>
<td>444</td>
<td>-78%</td>
</tr>
<tr>
<td>Serial volumes withdrawn (exclude periodicals)</td>
<td>689</td>
<td>7025</td>
<td>-90%</td>
</tr>
<tr>
<td>Periodical titles withdrawn</td>
<td>0</td>
<td>24</td>
<td>-100%</td>
</tr>
<tr>
<td>Periodical volumes withdrawn</td>
<td>0</td>
<td>5037</td>
<td>-100%</td>
</tr>
<tr>
<td>Microform serial titles withdrawn (incl. periodicals)</td>
<td>0</td>
<td>65</td>
<td>-100%</td>
</tr>
<tr>
<td>Microform serial units withdrawn (incl. periodicals)</td>
<td>0</td>
<td>2500</td>
<td>-100%</td>
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<tr>
<td>Electronic Resource titles withdrawn</td>
<td>5</td>
<td>8</td>
<td>-38%</td>
</tr>
<tr>
<td>Titles recataloged</td>
<td>421</td>
<td>840</td>
<td>-50%</td>
</tr>
</tbody>
</table>

## Serials Acquisitions Statistics

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2009</th>
<th>FY2008</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Periodical issues checked in</td>
<td>15063</td>
<td>17203</td>
<td>-12%</td>
</tr>
<tr>
<td>Microform units checked in</td>
<td>242</td>
<td>291</td>
<td>-17%</td>
</tr>
<tr>
<td>Computer file units checked in</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Standing order volumes checked in</td>
<td>1368</td>
<td>1561</td>
<td>-12%</td>
</tr>
<tr>
<td>Claims issued</td>
<td>1716</td>
<td>2227</td>
<td>-23%</td>
</tr>
<tr>
<td>Voyager record created for analytical items</td>
<td>1006</td>
<td>936</td>
<td>7%</td>
</tr>
<tr>
<td>Invoices Approved</td>
<td>957</td>
<td>1066</td>
<td>-10%</td>
</tr>
<tr>
<td>Periodical replacement issues ordered</td>
<td>29</td>
<td>488</td>
<td>-94%</td>
</tr>
<tr>
<td>Periodical replacement issues received</td>
<td>9</td>
<td>274</td>
<td>-97%</td>
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</tbody>
</table>

## Electronic Resources

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2009</th>
<th>FY2008</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to Unique E-Journal Titles *</td>
<td>24910</td>
<td>34000</td>
<td>-27%</td>
</tr>
<tr>
<td>New databases added</td>
<td>40</td>
<td>37</td>
<td>8%</td>
</tr>
<tr>
<td>Access to Online Databases</td>
<td>289</td>
<td>250</td>
<td>16%</td>
</tr>
</tbody>
</table>

* Effective 2009, we changed the way we count unique titles by using the new ARL program for deduplicating serial titles in the Serials Solutions Knowledgebase

## Bindery Statistics

### Commercial Binding:

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2009</th>
<th>FY2008</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books to Match</td>
<td>97</td>
<td>112</td>
<td>-13%</td>
</tr>
<tr>
<td>Custom Books</td>
<td>578</td>
<td>770</td>
<td>-25%</td>
</tr>
<tr>
<td>Digicover, Economy</td>
<td>4542</td>
<td>3721</td>
<td>22%</td>
</tr>
<tr>
<td>Periodicals</td>
<td>2153</td>
<td>3869</td>
<td>-44%</td>
</tr>
<tr>
<td>Theses</td>
<td>723</td>
<td>488</td>
<td>48%</td>
</tr>
<tr>
<td>Phase Boxes</td>
<td>100</td>
<td>129</td>
<td>-22%</td>
</tr>
</tbody>
</table>

### In-House Binding:

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2009</th>
<th>FY2008</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pamphlets (hard,soft)</td>
<td>284</td>
<td>152</td>
<td>87%</td>
</tr>
<tr>
<td>Repairs</td>
<td>335</td>
<td>285</td>
<td>18%</td>
</tr>
<tr>
<td>Replacement Pages</td>
<td>509</td>
<td>324</td>
<td>57%</td>
</tr>
</tbody>
</table>
SYSTEMS DEPARTMENT (FY09)
Prepared by Chulin Meng, Head of Library Systems

Highlights

- Voyager 7 upgrade: Voyager ILS was upgraded to version 7 in March 2009. This upgrade brought us to the latest Voyager “major release” level. In August, we finished the 7.0.4 patching for Voyager system to get the fixes needed for the new OPAC. This upgrade also makes it possible to more closely integrate Voyager with other applications using the Voyager Web Services.

- Redesigned Pegasus OPAC: As the result of months of rigorous development and testing, the new Pegasus OPAC went live in August 2009. The newly redesigned catalog interface includes:
  a) A clean and easy to navigate contemporary display for the library catalog. The new interface includes user-focused search screens, improved navigation and labeling, and a re-designed Quick Search option.
  b) Updated titles summary display. New features include citation-style catalog entries, alternating background colors for items on the display, a "Filter Your Search" box on the titles summary display.
  c) Updated bibliographic displays that include easily-understood labels and the most-commonly-used fields. An action box is prominently displayed on the page to encourage users to place requests, download or print the record, and access additional information about the title.
  d) Link to Google Book Search. Users will see the link automatically when the title is available at Google Book Search. Using this new link, library patrons can now enhance their findings with Google Book Search features such as full text, book previews, and cover thumbnails.
  e) Book Cover Images. The new interface displays Amazon book cover image when available. It could easily be reconfigured to display book cover images from Google Books, Open Library, or Syndetics Solutions.
  f) Open web standards for future improvements. By using open standards, the new OPAC allows us to make sophisticated customizations that match our patron needs and service offerings. It is also possible to develop localized functionalities using CSS, Javascript, XML, and XSL.

More Projects Completed by Systems Department

- Voyager Maintenance: continued to maintain and improve the Voyager ILS to provide a stable and effective platform for library staff and library patrons.
• Voyager Fiscal Period Close: FY10 ledgers and funds were successfully created. All these work were done at off-work time to insure no interruption to library acquisition staff’s work activities.
• Voyager customized reports: created Voyager reports for analyzing collections, services, and other library activities.
• Library website: contributed to library web development by adding new online forms, keeping database current, testing Drupal CMS for supporting dynamic management of staff web content, creating a library homepage to make it easier to search and find library resources.
• Federated Search: implemented Serials Solutions 360 Search to provide better access to electronic resources, by letting patron search multiple resources with a single query.
• CONTENTdm installation and upgrades: CONTENTdm system was upgraded to the latest version, new acquisition stations were installed with OCR functionality.
• Upgraded Pegasus express workstations.
• Installed of new staff PCs.
• Maintains E-resources list on Proxy Server.
• Maintains Library wiki, Gallery, and Blog applications up-to-date.
• Physical servers were moved from Crown Center to new server room in Dumbach, and some servers on old hardware were moved to virtual servers.
• Server OS upgrades from win2k to win2k3.
• Provide assistance to Law Library with Illiad implementation.
• Managed library Personally Identifiable Information (PII) Protection Program

Review of FY08 Departmental Goals

The general goal of Systems Department is to maintain, deploy, and develop library systems and applications to ensure that library staff has the right tools for acquiring, organizing, and presenting our information resources to meet our students and faculty’s information needs.

Through collaboration with other library departments, Systems completed these FY08 specific goals:
• Website Redesign – Worked with the Web Team to integrate new search tools, make website more interactive, and providing access to new library online collections and services.
• ETD Project – Worked with ETD committee and Graduate School to implement online submission interface and a local repository for electronic thesis and dissertations.
• CONTENTdm – Support WLA and Archives in creating online collections, design and customize the look and feel of LUC CONTENTdm site.
• 360 Search – Worked with Serials and Reference to implement 360 Search, conduct user survey to study library patron’s federated search experiences.
- Voyager 7 Upgrade – Worked with the Voyager steering committee to plan and implement Voyager 7 upgrade. Worked with OPAC team to redesign Pegasus OPAC.

Departmental Goals for FY10

In the new academic year, the Systems Department will continue to improve and enhance library systems and technologies. Some of the specific goals include:

- Pegasus OPAC: Continue to improve library online catalog, add requests (recall, on hold, etc) links in Action Box, Refworks format export, and sending call number via text messages.

- Voyager Analyzer and Customized reports: Plan and implement Analyzer reporting application organize Analyzer training for library staff, create customized reports.

- Library Website: Roll out the newly designed home page which integrate search tools into easy to use tab design, create a content management plan for keep web content up-to-date, move StaffWeb to Drupal.

- CONTENTdm: Improve the web interface for special collections

- Voyager Data improvement: OCLC data reclamation, make OCLC number consistence, add 13-digit ISBN number, add library proxy link to online resource URLs.
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Introduction

FY09 was another busy one at the Loyola University Chicago Archives and Special Collections although the overall number of reference requests decreased by 42% from FY08, bringing annual statistics back in line with previous years. This decrease was due to the completion of the Loyola history book project, which ended the many requests for fact checking, scanning, and other research from the author. Staff made excellent use of this new “free” time by directing their efforts towards improving access to collections through the creation of catalog records and online finding aids; tackling the accessioning and processing backlogs; and creating digital collections. Several projects were undertaken this year in collaboration with other university departments including the Loyola University Museum of Art, the Hank Center for Catholic Heritage, the School of Law, and Alumni Relations, thus enabling staff more chances to promote collections and provide services to the Loyola community. Following are some of the highlights for FY09. See appendices A – F for further details.

Access

Access continues to be the primary goal of the University Archives and Special Collections department and FY09 showed significant progress in this area, specifically in the areas of catalog records, finding aids available online, and the creation of digital collections. Following are some of the highlights:

- **Catalog records**
  Thirty-one (31) catalog records were added to OCLC and Pegasus during FY09 to bring the number of records to 47. The increase in the number of catalog records has allowed for the development of standardized procedures which include the following steps: 1) update the legacy finding aid to the standardized format, including creating an electronic copy if necessary, and verify administrative information; 2) create a PDF version of the finding aid and place online; 3) create a catalog record in OCLC; 4) original monograph cataloger checks OCLC record; and 5) upload the record to Voyager/Pegasus. In addition to the development of these procedures, the Archives Associate and archivist for the Center for Public Service are being instructed in how to catalog archival collections.

- **Finding Aids**
  Forty-two finding aids are now available online through the University Archives and Special Collections website. Currently there are over 100 finding aids available at the archives, however upon review it has been discovered that many contain incorrect information, are only preliminary listings, or are not available electronically. Thus many finding aids need to be updated, corrected, or entered into Microsoft Word prior to creating a PDF version for placement online. Work on this continues as time permits.

In addition to placing finding aids online, the hard copies have been placed in binders to make them more accessible for patrons. These binders are arranged according to administrative office; college or school; manuscript collections A – Z; Insull; and audio-visual collections.

- **Loyola Phoenix**
  The Loyola Phoenix issues from 2002 to 2007 have been microfilmed, cataloged by serials, and placed with the other microfilm. A master copy of the microfilm is retained in the archives.
• **Digital Collections**

Two digital collections are now available with two more in progress. The first digital collection created by the archives was in conjunction with the celebration of the School of Law’s Centennial and contains documents and photographs from the early years of the school, including the letter requesting that St. Ignatius College establish a law school. We plan to continue adding items to this collection, including sound bites from interviews done with Law School faculty, staff, and alumni.

The second digital collection created is from the Catholic Church Extension Society records. Two of the most frequently requested parts of the collection are the chapel car logs and photographs, thus making a digital collection containing selected photographs and log entries an easy decision. With the help of Dominican University GSLIS practicum student Kate Elgayeva, who chose, scanned, and entered the metadata for these items, this collection is now available. Items will continue to be added as time and staffing permits.

A third project highlighting commencements at St. Ignatius College/Loyola University is underway. This collection will contain commencement programs, photographs, commencement speeches, and ephemera such as tickets. The documents in this collection will be OCR’d to enable search capabilities.

The fourth project underway is the digitization of selected items from the Raymond V. Schoder, S.J., Slide Collection. Images from this collection will highlight the areas of Ancient Greece, Rome, and Egypt; Medieval Europe; classical art; the Soviet Union; and Japan and China. It is anticipated that this collection will be useful for faculty members in the History, Theology, Philosophy, Classical Studies, Anthropology, Fine Arts, and English departments.

**Center for Public Service Archives**

During FY09 former congressman Dan Rostenkowski came to the Center for Public Service Archives several times to help identify people and events in photographs. This assistance has been essential as it will help provide patrons better access to photographs documenting Rostenkowski’s career.

**Acquisitions**

Approximately 151 linear feet of records and papers were acquired during FY09, mainly in the area of institutional records, down 81 linear feet from FY08. Among the acquisitions were several publications by authors that used research or images from the collections and several publications from faculty members, which were added to the faculty monograph collection. These acquisitions included:

- History Department records 16.0 linear feet
- University Libraries records 10.0 linear feet
- College of Arts and Sciences records 9.5 linear feet
- Marty Lane, Alumni Relations records 15.5 linear feet
Criminal Justice Department records 7.0 linear feet

Center for Public Service Archives
At this time the Center for Public Service Archives is not actively seeking collections, however several small additions to the Hyde papers have been received, including two volumes of the Congressional Record documenting Hyde’s last year in office (2006), and several photographs and letters from his daughter, Laura Hyde.

Processing
During FY09 a total of 155.88 l ft was processed (including 96.50 l ft of Rostenkowski papers), an increase of 59% over FY09; the development of a priority processing plan began; and processing procedures began to be revised according to Greene and Meissner’s “More Product Less Process” and adapted for our situation.

- **Priority Processing plan**
  Three criteria are being used to develop the priority processing plan: 1) date of acquisition, 2) restriction procedures for institutional records, and 3) importance of information in the records/papers. Accession logs are being reviewed to determine what has been processed; to what degree it has been processed (preliminary or final); date of acquisition and where it would fall in the 20 year restriction; and importance. After collecting this data a final plan will be created.

- **Processing procedures**
  Using Greene and Meissner’s MPLP as a starting point, processing procedures are being revised in order to facilitate faster processing of collections. Greene and Meissner’s recommendations are being adapted to fit the storage environment at Cudahy as well as the condition of each collection. Among the new procedures in place are the creation of a more detailed list and weeding duplicates during accessioning; not removing and replacing staples or paper clips unless they are rusty; and not re-foldering materials or interleaving with acid free paper unless absolutely necessary.

- **Collections processed include**
  Parmly Hearing Institute records, 1938-2001 4.75 linear feet
  Charles I. Doyle, S.J., papers, 1846, 1862-1973 (bulk 1924-1964) 2.0 linear feet
  Center for Urban Policy records, 1979-1988 1.5 linear feet
  Alvo E. Albini papers, 1967-1994 8.33 linear feet
  John C. Fitzgerald, J.D., papers, 1927-1992 6.0 linear feet

Center for Public Service Archives
The archivist for the Center for Public Service Archives conducted a survey of the Rostenkowski papers from September to October to determine the best series to begin with and which could possibly be sampled down. Following the survey, the archivist began processing several of the smaller series. Since
September 2008 approximately 96.50 l ft of the Rostenkowski papers has been processed. The current objective is to have several series processed and ready for opening January 1, 2010.

Reference

A total of 576 reference requests were received during FY09, down 42% from the previous fiscal year. This reduction in reference requests coincides with the conclusion of the Loyola history book project. During the past year a number of international reference requests were received from scholars in the United Kingdom; New Zealand; Ireland; Chile; Germany; and Holland. In addition, a professor from Saudi Arabia stopped by to see if we had any rare books in Arabic. Other notable reference requests came from Tom Haney of the Law School, who used the archives to research his book on the centennial of the school; Tappan Wilder, nephew and literary executor for Thornton Wilder, who was looking for information on an image of Thornton Wilder that is in the autograph collection; Fr. Jim McDermott, editor of America Magazine, who needed employment dates for Robert C. Hartnett, SJ, at Detroit Mercy and Loyola; several people who inquired about the availability of the Henry Hyde papers; and several middle school students researching Samuel Insull for the Metro History Fair.

Center for Public Service Archives

Inquiries about the Rostenkowski and Hyde papers at the Center for Public Service Archives are currently handled by the University Archivist as those papers are not yet open. Once the Rostenkowski papers are opened for research (January 1, 2010), the Center for Public Service archivist will handle reference inquiries for them, however the University Archivist will continue to answer inquiries about the Henry Hyde papers.

Outreach

FY09 saw an increase in the development of exhibits as Archives and Special Collections was asked to create exhibits for the new cases in the Donovan Reading Room in Cudahy Library in addition to exhibits in the standing cases and the archives wall case. This has created the opportunity to include, when possible, more rare books and original materials in the exhibits. Since August 2008, Archives and Special Collections has produced four successful exhibits for the space:

- **History of Loyola University Chicago**, ran from August 2008 to January 2009, and highlighted Loyola’s history through alumni, sports, campus changes, and student organizations.

- **Lincoln Bicentennial Celebration**, February 2009 to August 2009, was created in collaboration with Dr. Ted Karamanski of the History department. This exhibit used rare books, documents, photographs, diaries, and other materials to highlight Lincoln’s life from boyhood to death. The exhibit also included sections on how Lincoln has been remembered by Americans and the connections St. Ignatius College/Loyola has to the Civil War.

- **Presidential Documents and views of Washington, DC**, was on display from January to June 2009. This exhibit was developed from the display on politics and governing that was used for the 2009 Archives Open House and included scans of presidential and other political documents from the autograph and Halstead collections in addition to photographs of Washington, DC, in the late 19th century.
• **Loyola Presidents**, on display from June 2009 to current. This exhibit was created for Founders’ Day weekend and includes portraits, photographs, and scrapbooks highlighting several of St. Ignatius/Loyola’s most influential presidents.

In addition to exhibits in the reading room, displays continue to be made for the archives wall case on the 2nd floor. These displays have included *Women of the Law School, History of the Law School*, and *What I did on my summer vacation.*

**LUMA Exhibit**

In the fall of 2009 archives staff worked with D’Arcy curator Jonathan Cannings on an exhibit highlighting a painting that was originally thought to be of St. Ignatius Loyola but which, after research conducted by Jonathan, was determined to be of St. Francis de Borgia. Several rare books on St. Francis de Borgia were loaned to LUMA and put on display with the portrait in an exhibit entitled “A Portrait in Search of an Identity”, now available online at [http://www.luc.edu/luma/Collections/D%27Arcy_collection/San_Francisco_de_Bor.html](http://www.luc.edu/luma/Collections/D%27Arcy_collection/San_Francisco_de_Bor.html). Archives staff continue to work with the D’Arcy curator and other LUMA staff on possible future exhibits in addition to sharing information on a variety of issues common to both professions. In addition, LUMA’s board has approved the de-accessioning and transfer of several books in the LUMA collection to the Loyola University Libraries’ rare book collection. This is anticipated to occur by the end of the calendar year.

**Open House**

One open house was held for two days in October 2009. The displays focused on politics and governance and used rare books and documents from the Halstead and autograph collection. A bibliography of selected rare books in the areas of governance and politics was created and placed online. There was limited attendance for the open house.

**Hank Center Symposium**

In September of 2008 a series of symposiums were held to celebrate the centennial of Loyola as a university. During this time the Hank Center for Catholic Heritage sponsored a symposium on Jesuits and the Sciences. After being contacted by the Hank Center, Archives and Special Collections created two exhibits from the rare books highlighting the contributions of Jesuits to the sciences. One of these exhibits was displayed in the Cudahy Library standing cases next to the door of the reading room while the other became a “traveling” exhibit and was on display at the Simpson multipurpose room during the symposium. In addition, a bibliography highlighting Jesuits and the sciences in the rare book collection was created and made available online.

**Special and Ongoing Projects**

**AJCU Archivists and Digital Project Librarians Meeting**

At the end of March the archives hosted a two day meeting of AJCU Archivists and Digital Project Librarians in conjunction with the annual AJCU Library Directors’ meeting, this year held at Loyola. The first day of the meeting consisted of workshops on copyright, converting audio files to digital files, and customizing CONTENTdm templates, and the second day involved a series of discussions.
about where we want to take the collaborative AJCU CONTENTdm project now that the pilot project was finished. The group set up a steering committee to guide the development of the project and a set of deadlines to meet as we go forward.

School of Law Centennial Anniversary

From the summer of 2008 through the spring semester of 2009 the archives worked closely with Professor Thomas Haney of the School of Law on his centennial history of the school “The First 100 Years”. Archives staff suggested records and other sources, conducted research to verify facts, and provided the majority of photographs and other images used in the book. In addition to the centennial history, archives staff worked with Law library staff to create two exhibits highlighting Law School history for display at the Law library. The first exhibit was on display during the fall 2008 semester and the second was displayed during the spring 2009 semester.

School of Education 40th Anniversary

During the spring semester of 2009 the archives was contacted by Emily Mullin of Development for assistance in obtaining oral histories of emeriti faculty for the School of Education in anticipation of SOE’s upcoming 40th anniversary. In conjunction with Dean Prasse and Emily, Laura Malmberg, graduate assistant for the Loyola Oral History Project, conducted several interviews with emeriti faculty and provided SOE with copies of the interviews. In addition, archives staff has been assisting a graduate student from SOE who is conducting research in order to write a brief history of the school for a special edition of the alumni newsletter.

“Loyola Traditions”

In December the archives was contacted by Nicole LeDuc Meehan, director of Alumni Relations, about possibly creating a “Loyola Traditions” part of the archives’ website. After several weeks of research by staff, and work with the UMC web liaison, the new pages highlighting Loyola traditions appeared on the website. This is an ongoing project that is updated as additional traditions are suggested and as images highlighting traditions are found.

Illinois Historic Preservation Agency: Lincoln and David Davis Papers Projects

Several years ago the Illinois State Historical Library and Historic Preservation Agency sent a request to repositories inquiring about any Lincoln documents they might hold which could be scanned and added to the Lincoln Papers project (http://www.papersofabrahamlincoln.org). At that time information about the Lincoln telegram in the Halstead collection was supplied. In December 2008, two members of the IHPA team working on the Lincoln papers project came to the archives to scan the telegram. While discussing the project and the collection containing the telegram, it was discovered that in addition to the Lincoln telegram Loyola had several David Davis letters in the same collection that could be added to the David Davis papers project. The IHPA provided the archives with a CD containing TIFs of the documents that were scanned.

Loyola Oral History Project

The Loyola Oral History Project began in 2006 with a pilot project focused on documenting the history and development of the Rome Center through interviews with the founder, administrators, faculty, staff, and alumni. Since the initial phase, the project has continued to expand every year and has documented the School of Law, the School of Social Work, the School of Education, and long-time
Loyola employees. To-date 88 interviews have been taped: 36 for Rome Center, 33 for Law, 12 for Social Work, 4 for Education, and 3 for long-time-employees. The goal is to average 35 interviews of administrators, staff, faculty, and alumni for each unit documented. The next fiscal year will see the continuation of work on the School of Social Work and the School of Education.

CARLI Book Digitization Initiative

In March 2009 two proposals were submitted to the CARLI Book Digitization Initiative for digitizing issues of the Illinois Catholic Historical Review and several books about Chicago from the rare book collection. Notification that the proposals were accepted was received in June 2009 and the archives is waiting for further directions from CARLI. In the meantime, the archives is working with cataloging to have several of the Chicago books cataloged for the project.

Staffing

Kathy Young, CA, MLIS, MS; University Archivist and Curator of Rare Books
Kathy received her certification as a professional archivist and became a member of the Academy of Certified Archivists during FY09.

Rebecca Hyman, MLIS; Archives Associate
Rebecca received her MLIS from Dominican University’s Graduate School of Library and Information Science in December 2008.

Laura Berfield, MLS; Center for Public Service Archivist
Laura joined the Archives and Special Collections staff in September 2008 as the part-time project archivist at the Center for Public Service Archives. She is currently responsible for processing the Rostenkowski papers in anticipation of their opening in 2010.

Laura McDowell, Graduate Assistant for Archives and Special Collections
Laura started as the graduate assistant for Archives and Special Collections in March 2008, a position she held until July 1, 2009. Laura graduated from Loyola in May 2009 with a masters’ degree in Public History. During her time at the archives she was responsible for processing collections; assisting with exhibits and special projects; and helping answer reference requests.

Laura Malmberg, Graduate Assistant for Loyola Oral History Project
Laura started as the graduate assistant for the Loyola Oral History Project July 1, 2008, a position she held until June 30, 2009. In May 2009 Laura graduated from Loyola with a masters’ degree in Public History. During her time at the archives she furthered the oral history project by completing 34 interviews for the School of Law, School of Social Work, and School of Education.

Michael Allen, intern, History Department
Michael started his internship at the archives in January 2009 and finished in April 2009. During his time at the archives he processed a collection; assisted with exhibits; conducted research on Loyola traditions and wrote blurbs for the “traditions” part of the archives’ website; and worked on the photograph collections. He graduated from Loyola with a B.A. in History in May 2009.

Kate Elgayeva, Dominican University GSLIS practicum student
Kate joined the archives staff as a practicum student from Dominican University’s Graduate School of Library and Information Science in January 2009 and finished in April 2009. During this time she was exposed to daily archival administration tasks and was responsible for processing a collection and creating a digital collection in CONTENTdm from the Catholic Church Extension Society Chapel Car records and photographs.
FY09 Goal Review

- Create LibGuide for archives and primary resources. **Completed**
- Add 10 to 15 catalog records to OCLC and Pegasus. **32 records added**
- Update and reformat 10 to 15 legacy finding aids; make available online as PDFs. **31 completed**
- Continue developing new content for web site, including finishing administrative histories and creating online exhibits about Cudahy Library and the Norton mural. **Administrative histories and online exhibits are ongoing. New content added to the website include the “Loyola Traditions” section and several bibliographies for subjects in the rare book collection.**
- Complete deck E rare book inventory; clean and re-shelve books. **Ongoing. Shifting of large folios has begun and will free a large amount of shelving for shifting other volumes. Volumes are being dusted as they are shifted. Deck E rare book inventory will be completed after the shifting project.**
- Continue outreach to University departments and divisions. **Rebecca Hyman and Laura Berfield have been assigned the responsibility of developing an outreach program for the Archives and Special Collections department.**
- Create digital collection focused on Loyola history; develop projects for Jesuitica collection and for collections that would aid instruction at the University. **Ongoing. Two digital collections have been created – one highlighting the history of the Law School and the other highlighting the Catholic Church Extension Society Chapel Cars. Two other digital collections are in progress, the first being a collection highlighting commencements at Loyola and which will contain programs, speeches, and photographs, etc, and the second contains images from the Schoder Slide Collection.**
- Complete processing Rostenkowski papers and create comprehensive finding aid. **Ongoing. Significant headway has been made on processing the papers.**
- Develop a preliminary guide to the collections in the University Archives and Special Collections department. **Still under consideration.**
FY10 Goals

- **Continue improving access to collections by**
  - Adding 10 to 15 more catalog records to Pegasus and OCLC
  - Reformatting legacy finding aids and posting online; explore options for EAD finding aids
  - Digitizing student newspaper and yearbooks
  - Opening processed series of the Rostenkowski papers to researchers; create a finding aid for processed series
  - Creating bibliographies for selected subjects or collections in the Rare Book Collection

- **Develop an outreach program**
  - Targeting Loyola faculty, students, and alumni
  - Informing administration and staff about the archives and records management
  - Informing a broader audience about the collections

- **Create a strategic plan focusing on**
  - Supporting the libraries’ strategic plan
  - Supporting the university’s strategic plan
  - Improving and promoting access to collections
Appendix A: Comparative Yearly Statistics 2002 to 2008

<table>
<thead>
<tr>
<th></th>
<th>% Change</th>
<th>FY09</th>
<th>FY08</th>
<th>FY07</th>
<th>FY06</th>
<th>FY05</th>
<th>FY04</th>
<th>FY03</th>
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<tbody>
<tr>
<td>Phone Calls – LUC</td>
<td>(47)</td>
<td>72</td>
<td>135</td>
<td>98</td>
<td>124</td>
<td>102</td>
<td>109</td>
<td>95</td>
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<tr>
<td>Phone Calls – External</td>
<td>(19)</td>
<td>78</td>
<td>96</td>
<td>78</td>
<td>87</td>
<td>96</td>
<td>156</td>
<td>156</td>
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<tr>
<td>E-mails</td>
<td>(45)</td>
<td>311</td>
<td>562</td>
<td>226</td>
<td>228</td>
<td>223</td>
<td>120</td>
<td>98</td>
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<tr>
<td>Letters</td>
<td>(71)</td>
<td>2</td>
<td>7</td>
<td>10</td>
<td>9</td>
<td>9</td>
<td>14</td>
<td>11</td>
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<tr>
<td>On-Site Researchers</td>
<td>(45)</td>
<td>111</td>
<td>201</td>
<td>215</td>
<td>205</td>
<td>199</td>
<td>134</td>
<td>127</td>
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<td>ILL</td>
<td>200</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>

Total Internal Requests    (53)  328  705  377  426  306  188  No data
Total External Requests    (16)  248  296  253  232  329  335  No data
Total Research Inquiries   (42)  576  1001 630  658  635  532  486
Number of Acquisitions     9    54   49   37   58   59   30   44
Linear Feet                (35)  151.90 232.15 468  219  230  81   142
L FT Processed             59   156.14 63.25 7.0  121.0 26.0 48.0 38.25
Dissertations and Theses   (26)  173  233  177  266  122  281  277
Website page views         7,472* No data No data 18,937 18,867 7,592 4,273
Website unique page views  4,142* No data No data 3,700 3,604 2,813 No data

*Website tracking began again in February 2009, seven months into FY09, thus only 5 months’ data is represented in the chart.
Appendix B: Catalog Records Created & Finding Aids online

Catalog records created and uploaded to Pegasus during FY09.


Athletics department records, 1924-1981

Catholic Church Extension Society records, 1906-1962

Center for Urban Policy records, 1979-1988

Charles I. Doyle, S.J., papers 1846-1973 (bulk 1924-1964)

Council, Committee, and Board records, 1911-1968

Dan Rostenkowski papers, 1958-1995

David C. Thomasma, Ph.D., papers, 1981-1996


Forrest McDonald papers, 1873-1963 (bulk 1955-1959)

Halstead Collection, 1826-1942

Henry J. Hyde papers, 1974-2006


James J. O’Keefe papers, 1934

John Byrne papers, 1832-1936, n.d. (bulk 1832-1900)


John F. O’Keefe papers, 1927-1939

Leander Hamilton McCormick Papers, 1874-1923 (bulk 1874-1893)


Office of the Assistant Dean records, 1930-1944 (bulk 1937-1943)

Office of the Dean records, 1931-1942 (SSOM)

Office of the Regent records, 1925-1942 (SSOM)

Peoples Gas Light & Coke Co. records, 1887-1952 (bulk 1909-1930)

Peter T. Swanish, Ph.D., papers, 1921-1971, n.d.


Veteran Faculty and Staff Oral History Project, 1986-2001

Vincent V. Herr, S.J., papers, 1905-1971 (bulk 1945-1968)

Parmly Hearing Institute records, 1938-2001 (bulk 1942-1967)

**Finding aids placed online during FY09**

1) Administration

*Office of the President*  
Samuel K. Wilson, S.J., records, 1920-1942

*Student Affairs*  
Athletics Department Records, 1924-1978

2) Colleges/Schools

*College of Arts and Sciences*  
Black World Studies (formerly African-American Studies)

Parmly Hearing Institute

*Stritch School of Medicine*  
Council, Committee, and Board Records, 1911-1968

*Office of the Dean*  
Louis David Moorhead, M.D., records, 1931-1940

Francis J. Braceland, M.D., records, 1938-1942

*Office of the Assistant Dean*  
John Glen Powers, M.D., records, 1930-1944

*Office of the Regent*  
Terence H. Ahearn, S.J., records, 1925-1937

George Warth, S.J., records, 1936-1942

*Medical Humanities Program*  
David C. Thomasma, Ph.D., papers, 1981-1996

*John Felice Rome Center Office of the Director*  
John Felice records, 1961-1997
3) Faculty & Staff

   Alvo E. Albini (1917-1994)
   Director of Public Relations, 1967 to 1983.

   Charles I. Doyle, S.J. (1889-1973)
   Psychology Department, 1933-1970

   Stanley Fahlstrom, M.D. (1901-)
   Stritch School of Medicine, 1929-1970; 108th General Hospital, 1943-1947

   John C. Fitzgerald, J. D. (1903-1991)
   School of Law, 1929-1959

   Political Science Department, 1956-1975

   Psychology Department, 1939-1970

   Imogene M. King, RN, Ed.D (1923-2007)
   Niehoff School of Nursing, 1961 to 1968; 1972 to 1980

   English Department, 1948-1973

   Peter T. Swanish, PhD (1895-1971)
   School of Business Administration, 1921-1934, 1949-1964

4) Catholic organizations

   Illinois Catholic Historical Society [Illinois Catholic Historical Society records]

   National Catholic AIDS Network (NCAN) [NCAN records]

5) Insull and related collections

   Forrest McDonald papers
   James O'Keefe papers
   John O'Keefe papers
   Peoples Gas Light and Coke Company records

6) Chicago collections

   Leander Hamilton McCormick papers, 1874-1923
   John Byrne papers, 1832-1936

7) Political collections

   Halstead Collection
   Arthur L. Berman papers, 1977-2003
Appendix C: Digital Collections

Digital Collections

School of Law

Established in 1909, Loyola's School of Law celebrates its centennial during the 2008 - 2009 academic year. This collection highlights the early years of the School of Law through photographs and documents, including the letter from several prominent Chicago attorneys requesting the establishment of a law school at St. Ignatius College. The collection currently contains 32 items with metadata.

Chapel Cars

During the first half of the 20th century chapel cars sponsored by the Catholic Church Extension Society traveled to remote parts of the United States in order to provide Church services to Catholics living in those areas. These chapel cars carried priests who performed Mass, Holy Communion, and baptisms, and taught children their catechism. This collection highlights the Chapel Cars St. Anthony, St. Paul, and St. Peter through photographs and log entries. This collection contains 35 items with metadata. The logs have been OCR’d to enable full search capabilities.

Digital Collections in Progress

Loyola Commencement

The Loyola Commencement collection will include commencement programs, speeches, photographs, and ephemera highlighting graduation at the university. Currently this collection consists of four commencement programs ranging from 1898 to 1920 with limited metadata.

Raymond V. Schoder, SJ, Slide Collection

The chair of the History and Classical Studies departments were contacted to see if there was interest in having selected slides from the Schoder Slide Collection available digitally for use in classes. Members of the History department answered enthusiastically and assisted in selecting subject areas from the collection that would be most useful. Classical Studies has yet to respond. Based on the response from the History department, digitization of slides that had the most potential use for courses in the fall has begun. While not yet available through the archives’ website, this collection currently has seventy-three items, with metadata, highlighting the subjects of Ancient Egypt and Japan.
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<th>Date</th>
<th>Donor</th>
<th>Collection</th>
<th>LFT</th>
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<td>7/01/08</td>
<td>Ruth Davis</td>
<td>Chicago College of Dental Surgery photographs - Ellis C. Johanson (father)</td>
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<tr>
<td>7/01/08</td>
<td>Jo An Riker</td>
<td>Frank M. Conley papers</td>
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<tr>
<td>7/01/08</td>
<td>Ann Fritze</td>
<td>Special Events records - Stritch annual awards dinner</td>
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</tr>
<tr>
<td>7/01/08</td>
<td>Cheryl - CAS</td>
<td>College of Arts and Sciences records</td>
<td>3.0</td>
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<td>7/11/08</td>
<td>Vianey Suarez - UMC</td>
<td>UMC Records</td>
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<td>7/28/08</td>
<td>Loretta Brady</td>
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<td>8/7/08</td>
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<td>8/8/08</td>
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<td>Staff Council Records</td>
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<td></td>
<td>Creighton University</td>
<td></td>
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<td>8/18/08</td>
<td>Archives</td>
<td>1 volume - Chicago Sun</td>
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<td>Earl Weiss, S.J. - Theology</td>
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<td>One photo cd of Richard J. Klarchek</td>
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<td>Cordwell Buenz</td>
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<td>Christine Wiseman - Provost</td>
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<td>Judy Barr Topinka</td>
<td>1 program Eucharistic Congress 1926</td>
<td>0.1</td>
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<td>10/3/08</td>
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<td>Fr. John Costello, S.J. papers – including 10 Greeley books</td>
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<td>11/3/08</td>
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<td>Philip Wicklander papers - Printer's plate from Chicago Tribune Loyola ad</td>
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<td>Item Description</td>
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<td>Maureen Kitzer</td>
<td>1 book American History by Samuel K. Wilson, S.J.</td>
<td>0.25</td>
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<tr>
<td>12/1/08</td>
<td>Christine Kermaine</td>
<td>1 miniature book for art installation</td>
<td>0.01</td>
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<tr>
<td>12/11/08</td>
<td>Special Events</td>
<td>Banners</td>
<td>1.5</td>
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<td>Dean of Libraries Records</td>
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<td>12/22/08</td>
<td>Joseph R. Laurin</td>
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<td>1/15/08</td>
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<td>Henry Hyde Papers</td>
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<td>3/1/09</td>
<td>Robert Seal</td>
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<td>Edgar M. Martin Papers - Loyolan, 1941 and 1942, Loyola 1/2 Century Club pin, frat pins</td>
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<td>4/1/09</td>
<td>Michael Cabonce</td>
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<td>4/6/09</td>
<td>Phil Hale</td>
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<td>4/25/09</td>
<td>Daniel Lunney</td>
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<td>Christine Schwern, Chicago History Museum</td>
<td>2 journals - article in Chicago History, Spring 2009, &quot;The Ramblers and Blue Demons&quot; by Raymond Schmidt</td>
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<td>5/13/09</td>
<td>University Libraries</td>
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<td>Cheryl - CAS</td>
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<tr>
<td>Date</td>
<td>Department</td>
<td>Record Title and Notes</td>
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<td>6/1/09</td>
<td>University Libraries</td>
<td>Dean of Libraries Records</td>
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<td>6/5/09</td>
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<td>Student Affairs - Office of Vice President Records</td>
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<td>6/8/09</td>
<td>Maryann McDermot</td>
<td>Nursing records</td>
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<td>6/16/09</td>
<td>Criminal Justice</td>
<td>Dept. of Criminal Justice Records, 1975 - 2009</td>
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<td>6/18/09</td>
<td>Alumhni Relations</td>
<td>Alumni Relations Records - invitations, marketing materials, etc…</td>
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<td>6/19/09</td>
<td>Raymond Baumhart, S.J.</td>
<td>Bannakaroli Brothers Program Records (1 folder)</td>
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<td>6/23/09</td>
<td>Health Sciences Library</td>
<td>25 videos, 5 dvds</td>
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<td>6/23/09</td>
<td>Mary Lee Reed</td>
<td>Dr. Russell S. Reed Papers: 1912 Medical School Annual, 1913 Junk (Medical School Annual), 1913 Loyola University Chicago Commencement Program</td>
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<td>6/30/09</td>
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<td>Dean of Libraries Records - 12 blueprints of Cudahy Library and 25 E. Pearson and 2 b&amp;w photos of Cudahy and Water Tower Campus</td>
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<td>6/30/09</td>
<td>Dr. Vytenis Grybaskas</td>
<td>oversized b&amp;w photos taken by Algimantas Kezys</td>
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<td></td>
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<td><strong>Total FY09</strong></td>
<td><strong>151.9</strong></td>
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Notable Publications Received


Laurin, Joseph R. Poets of Tragedy in Classical Athens.


Faculty Monograph Collection Additions

Bosco, Mark and Kimberly Rae Connor, eds. Academic Novels as Satire. 2007

Bosco, Mark S.J., and David Stagaman, S.J., ed. Finding God in All Things. 2007

Appendix E: Collections Processed

**University Archives**

<table>
<thead>
<tr>
<th>Collection</th>
<th>Size</th>
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<tbody>
<tr>
<td>Parmly Hearing Institute records, 1938-2001 (bulk 1942-1967)</td>
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<tr>
<td>Center for Urban Policy records, 1979-1988</td>
<td>1.50 l ft</td>
</tr>
<tr>
<td>Charles I. Doyle, S.J., papers, 1846, 1862-1973 (bulk 1924-1964)</td>
<td>2.0 l ft</td>
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<tr>
<td>Stanley Fahlstrom, M.D., 1942-1947</td>
<td>.25 l ft</td>
</tr>
<tr>
<td>James J. O’Keefe papers, 1934</td>
<td>.25 l ft</td>
</tr>
<tr>
<td>John O’Keefe papers, 1927-1939</td>
<td>.50 l ft</td>
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<tr>
<td>L. Hamilton McCormick papers, 1874-1936</td>
<td>.25 l ft</td>
</tr>
<tr>
<td>John C. Fitzgerald papers, 1903-1991</td>
<td>6.0 l ft</td>
</tr>
<tr>
<td>John Byrne papers, 1832-1936</td>
<td>1.75 l ft</td>
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<tr>
<td>Alvo E Albini papers, 1967-1994</td>
<td>8.33 l ft</td>
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<td>* B. G. Gross papers</td>
<td>18.05 l ft</td>
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</table>

**Center for Public Service Archives**

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<tr>
<th>Section</th>
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<tr>
<td>Campaigns</td>
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<tr>
<td>Speeches</td>
<td>11.0 l ft</td>
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<tr>
<td>Publications</td>
<td>2.0 l ft</td>
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<tr>
<td>*Audio-Visual</td>
<td>20.0 l ft</td>
</tr>
<tr>
<td>Academies</td>
<td>6.0 l ft</td>
</tr>
<tr>
<td>*Administrative Assistants and Staff</td>
<td>49.5 l ft</td>
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</tbody>
</table>

**Total** 156.14 l ft

*Not completely processed*
## Appendix F: Loyola Oral History Project

### Interviews 2008-2009

1. Barnhart, Fred (Law)  
2. Berlin, Barney (Education)  
3. Bloomquist, Pamela (Law)  
4. Brown, Donald J., Jr. (Law)  
5. Caldwell, Laura (Law)  
6. Canty, Megan (Law)  
7. Check, Lewis (Law)  
8. Cook, Vincent P. (Law)  
9. Eveland, William “Toby” (Law)  
10. Fogerty, James (Social Work)  
11. Geraghty, Diane (Law)  
12. Golden, Yolanda (Social Work)  
13. Grossman, Susan (Social Work)  
14. Gumz, Edward (Social Work)  
15. Gutek, Gerry (Education)  
16. Kilbane, Teresa (Social Work)  
17. Klein, Charlotte (Social Work)  
18. Landry, Blythe (Social Work)  
19. Lane, Martin (Long Time Employees)  
20. Martin, Samantha (Law)  
21. McCauley, Thomas V. (Law)  
22. Medina, Ivan (Social Work)  
23. Michael, Richard (Law)  
24. Mindell, Robert (Social Work)  
25. Perlin, Alice (Law)  
26. Pryce, Julia (Social Work)  
27. Rhodes, Anne-Marie (Law)  
28. Rose, Henry (Law)  
29. Shoenberger, Allen (Law)  
30. Sokolec, Jeanne (Social Work)  
31. Stitzer, Carol (Rome Center)  
32. Valenti, Jasper (Education)  
33. Vidal de Haymes, Maria (Social Work)  
34. Wozniak, John (Education)

### Transcriptions

**Completed by Graduate Assistants**

1. Stalzer, Rita, CSJ (Long Time Employees) – completed by Maria Reynolds and Laura Malmberg  
2. Martin, Samantha (Law) – completed by Laura Malmberg

**Outsourced to Victoria Haas, Tapescripts, Maywood, IL**

1. Arimond, James, SJ (Rome Center)  
2. Casey, Patrick (Rome Center)  
3. DeVoto, Paula (Rome Center)  
4. John Felice (Rome Center) – 3 interviews  
5. Gutek, Gerald (Rome Center)  
6. Mauro, Lucia (Rome Center)  
7. Wozniak, John (Rome Center)  
8. Appel, Nina (Law)  
9. Purcell, Charles (Law)
Please note that this report reflects the accomplishments for the Women & Leadership Archives from the close of FY2008 to close of FY2009. The goals as outlined in prior annual reports are often ongoing.

I. Personnel

Current:

Elizabeth A. Myers, Director & Archivist
Hired as Interim Director, August 2006
Confirmed as Director, February 2007
Ashley Eckhardt, Graduate Assistant
Hired, September 2007
Amber Kappel, Graduate Assistant
Hired, May 2009
Dolores Barber, Temporary Special Collections Cataloger
June – July, 2009

II. Accomplishments

1. Intellectual & Physical Control

- Security:
  General security at Piper Hall as improved. There were two reported incidents of theft in the building, neither of which affected the archives. Facilities members and independent contractors continued to have unlimited access to the lower level. Evidence of their presence included water bottles and Subway food wrappers in the trash. Several phone calls and emails to Frank Dale over a six week period resulted in the lower level archives being taken off the general key-pad access. Theoretically anyone who wants to enter the lower level must come to the 3rd floor first and find a staff member to gain access. Early indications are that this is working imperfectly.

- Lower Level Storage:
  During the summer of 2008 there was no water damager in the lower level and fewer bugs. In the early summer of 2009, heavy rains deposited three to four inches of water throughout the entire lower level. The water backed up from the sewers. As in 2007 carpets, insulation, and drywall were removed and as of early
August have not been replaced. A small amount of mold spore has bloomed in the archives, in the southeast corner, along the east wall near the floor. Facilities has been notified twice and asked to remove the entire section of drywall two feet above the former baseboard and disinfect the area. Action is still pending.

- **Reading Room:**
  The wonderful addition of an oversized tabloid scanner required making regular use of Sr. Ann Ida Gannon’s former desk space. The small color printer has also been moved to that area. Combined with a new computer installed during the spring semester, Ann Ida’s former area is now the center for our department’s scanning and display projects.

- **Cataloging Project:**
  From June 1 to July 9, Dolores J. Barber worked to create new catalog records for all of the collections in the WLA. She succeeded in creating over 60 new collection records and 9 replacement records for test records created in 2001. In addition, she also created a process manual and guide so that I can continue to create MARC records in the online saved file at OCLC. The records will continue to require the review and approval of Ling-Li Chang to ensure accuracy and continuity. At present, every collection at the WLA has a catalog record though just over half are still in the queue needing final approval and upload.

2. **Acquisitions & Accessions**
   Total new: 88.5 linear ft. (-6.3%)
   Janet Nolan
   Mundelein College Materials
   Chicago Women Church (addendum)
   Lucy A. Kennedy
   Sheli Lulkin
   Mollie West (addendum)
   Mary Ann Smith
   Women’s Studies and Gender Studies (addendum)
   Joan Frances Crowley, BVM (Svetlana Peters)
   Women-Church Convergence (addendum)
   Carol Ronen
   Gannon Scholars (addendum)
   Dan Vaillancourt (BVM Memoir Project)
   Katie McHugh, BVM
   Parrie Veo (Lyril Clark Van Hyning)
   Mary DeCock, BVM
   Jean Dolores Schmidt, BVM
   Katherine Taft Delage (addendum)
   Anne Patrick, SNJM
   Project IRENE (addendum)
3. **Processing** Total completed: 149.75 linear ft. (+38.34%)
   - Patricia A. Crowley, OSB
   - Mary DeCock, BVM
   - 8th Day Center for Justice
   - Anne E. Carr, BVM
   - Susan Ross
   - Immaculata High School
   - Carol Frances Jegen, BVM
   - Sheli Lulkin
   - Project IRENE, Addendum 1
   - Margaret (Peggy) Roach, Addendum 3
   - Jean Dolores Schmidt, BVM
   - Mundelein College AV Collection
   - Theresians (partially reprocessed)
   - Mercedes McCambridge (reprocessed)
   - Patricia Caron Crowley (reprocessed)

4. **General Reference & Special Reference Projects**
   - General Statistics (+/- FY2008):
     - In-Person Visits: 162 (+19.4%)
     - Phone Inquiries: 117 (+6.3%)
     - Email Inquiries: 101 (-27.8%)
     - Website Visits: June 30, 2008-July 1, 2009
       - Visitors: 12,000 (+82.98%)
       - Page Views: 74,438 (+280.9%)

5. **Basic Outreach**
   - 3 Class Visits to the archives (WSGS, Theater, Theology)
   - 4 Piper Hall Historic Tours (53 people)
   - Continued outreach to former donors (8 contacts)
   - Met with History Department Chair, Dr. Timothy Gilfoyle
   - Met with Public History Program Director, Dr. Ted Karamanski
   - Met with Hank Center Director, Dr. Michael Schuck
   - Met with VP Public Affairs, Phil Hale
   - Conducted History Pedagogy and Digital Content workshop for History Graduate Students with Jeannette Peirce.
6. Special Projects & Events

- **Women’s Resource Fair**
  Helped to plan, organize, and implement the inaugural Women’s Resource Fair sponsored by Rep. Harry Osterman, hosted by Loyola, and representing the Gannon Center. The WLA had a table and I presented at a panel session. Estimated attendance at the fair, 300 people.

- Continued partnership with the Chicago Area Women’s History Council.
  Organized and co-sponsored the event, “Preserving and Sharing the Sources,” at the Newberry Library, to connect potential donors to the WLA and other area archives. Estimated attendance, 120 people.

- **Chicago Archives Fair at the Newberry Library.**
  The WLA had a featured display, along with 20+ other repositories, and met with 100+ Chicago and Chicagoland high school teachers.

- **Displays at Cudahy Library & WLA**

- **Vespers at Piper Hall**
  Created 1 display, a series of photographs “Christmas at Mundelein, 1930-1989.”

- **Gannon Scholar Anniversary Event**

- **Mundelein College Reunion**
  Created, designed, and constructed 7 displays (Class of 1958, Phoenix Class Welcome, Class of 1982, Class of 1960, Class of 1962, Class of 1966, Class of 1938) for the reunion weekend.

- **Speaker Series**
  Hosted 4 speakers at Piper Hall highlighting research about women. Declining attendance and (friendly) competition from other Gannon Center and Women’s Studies and Gender Studies events may result in ending this program in 2010.

- Partnered with the Chicago Metro History Education Center to run a summer seminar for high school civics and history teachers related to primary source use in the classroom. I ran the workshop and presented, “Archives 101: An Introduction to Special Collections for Researchers.”
Presented, “Women & Leadership Archives, Mundelein College, and the Sisters of Charity of the Blessed Virgin Mary,” at the BVM motherhouse in Dubuque, IA.


Presented update of Mundelein College web content to the Mundelein College Alumnae Board.

Participated on the “From the Heartland” Radio Show to talk about the WLA collections and Mundelein College.

Website
Implemented Content DM. Two new exhibits have since been added: “Mundelein College Foundations, 1929-1934,” and “The Skyscraper Newspaper, 1931-1969.” The latter is keyword searchable thanks to the (awesome) addition of the OCR package. For the general website, continued to add new content and update regularly to “collections,” “news from the archives,” “new collection acquisitions,” “newly opened collections,” and “upcoming events.”

The Mundelein College section of the webpage also got several new interactive features including the “Timeline” modeled from the Loyola Timeline; “Who? What? When? Where? Help the Archives Identify Photos,” page with rotating images and a submission form; and an expanded, more detailed listing of the Mundelein College Records Collection series listing.

Finally, added the temporary subpage for the Women’s Resource Fair on the Gannon Center page that included links, pdfs, and interactive images. Later created links to the survey about the fair that helped organizers collect information from fair visitors.

III. Review of FY2008-2009 Goals

1. Complete the Mundelein Reorganization Project. Specific remaining projects include the processing and preservation of College photos, AV material, memorabilia, and restricted material.

   Status: Partially complete. The photographs have been reorganized according to Library of Congress standards. The AV material has also been processed and is now fully available. The memorabilia and restricted material remain to be completed.

2. Start Mundelein College Photo Digitization project by scanning photos and building a working index of terms (metadata).
Status: Redefined. This project was adjusted to hold off on digitizing the whole photograph collection and instead focus on the 3000+ negatives that do not have prints. This project is 65% completed. To date, 2149 negatives have been scanned. Approximately 1,000 remain.

3. Install and utilize key-word searchable photo software and make public through the website.

   Status: Complete. ContentDM functions in this capacity.

4. Utilize new brochure to do internal and external outreach including a mailing to all of the humanities-based departments at Loyola University Chicago along with a letter stating instruction/reference/project options.

   Status: Ongoing. (Note: there are about 200 brochures left.)

5. Continued support of the Speaker Series.

   Status: Ongoing. This program may be terminated in the spring 2010 semester due to declining attendance.

6. Continued Web development including the following features: finalization of the interactive timeline for the Mundelein College Records collection, a new homepage separate from the Gannon Center and included in the LUC web directory, digital image collections access, implement a more user-friendly collections search page, re-vamp the Women’s Archives Mapping Directory function, include a new sub-page for highlighting the Mundelein Phoenix Society class each year.

   Status: Ongoing. Many new features were added in addition to those listed here. See special projects.

7. Work on strengthening the ties between the Gannon Center and the WLA, intellectually, organizationally, and financially.

   Status: Completed and ongoing. Inclusion on several Gannon Center committees, formal and informal meeting with staff and the Gannon Center Director have greatly helped clarify the relationship between the center and the archives. It is possible that the temporary postponement of the permanent directorship of the center may affect the momentum of the relationship. Still, the monetary support of the temporary cataloging position, support and direction in collection development, and inclusion in center planning and events have all reflected a great improvement. Further, I proudly represented the Gannon Center during the planning and execution of the Women’s Resource Fair.

8. Process 100 linear ft. of material.
**IV. FY 2009-2010 Goals**

1. Complete the Mundelein College reorganization, specifically memorabilia and restricted materials.

2. Complete the Mundelein College negatives project, potentially create a ContentDM exhibit from some of the photos.

3. Finish comparison research for an alternative to PastPerfect archival software. Two primary options: Archon and Archives Toolkit. Sandbox Archon (open source) software, present alternatives to Bob Seal and Dawn Harris.

4. Reevaluate the Speaker Series. Possibly discontinue after the Fall 2009 semester.

5. Continue web development including exploring getting an RSS feed, add an additional two major ContentDM exhibits **NOT** related to Mundelein College, continue to re-evaluate the Women’s Mapping Directory, continue to rotate new content
including photos, throughout the site. Explore the use of Gateway as new ContentDM / OLCL catalog records.

6. Process 125 ft. of material.

7. Reorganize the collections on the lower level to best allow for collection expansion and continued use of the space. Remove or return boxes of duplicates as indicated by the deeds of gift. Re-evaluate 20+ small collections identified during the collection evaluation.

8. Continue general outreach internally and externally, including working with Advancement and Alumni Relations.

9. Participate in the 30th Anniversary Gala of the Women and Children First Bookstore as an opportunity to build their existing archival collection. Further this is a great opportunity to tap into new areas of potential collecting including local activists, writers, community builders, small business and non-profits, and the general lesbian community.

10. Continue to partner with the Chicago Metro History Education Center on outreach to high school teachers and their students. Need to explore the option of repeating the summer 2009 workshop in 2010. Also, through the CMHEC and Chicago Area Archivists, participate in the Archives Fair again.

11. Plan and execute the displays for the Mundelein College Reunion, Vespers at Christmas, and up to 4 displays for Cudahy Library.

12. Participate in the Library Passport Program with two special events: a film screening “The Trouble with Angels,” (September) and tour of the Skyscraper “Fact or Fiction? The Skyscraper Building” (October).

13. Continue to add new catalog records in a timely manner to OCLC and Voyager.