INTRODUCTION:

The Public Services Division is comprised of the following departments: Access Services, Administrative Services, the Klarchek Information Commons, Lake Shore Campus Reference Services, and the Lewis Library at the Water Tower Campus. Several committees play lead roles in Public Services and Collection Development including the Electronic Resources and Periodicals Committee (ERPC), the Collection Management Committee (CMC), the Learning Commons Committee (LCC), and the Collection Development Steering Committee (CDSC).

In addition to the primary responsibilities of the above listed departments and committees, the 2011 FY was largely concerned with implementation of the Library’s Strategic Plan. Beginning with the Library’s annual retreat, held at the Cuneo Mansion in June 2010, the library staff began to put into action the three primary foci of the strategic plan; Collections, led by Fred Barnhart; Space and Services, led by Leslie Haas; and Collaboration, led by Jeannette Pierce. The three working groups charged with implementing the plan all met frequently during the course of the year to tackle projects or make plans for future ones.

The Collaboration group worked to create a Collaboration Directory, with the goal of identifying, promoting, and increasing Library collaboration with other University departments. The group has also spearheaded the Library’s increased participation in the 1st year writing and university orientation courses (UCWR and UNIV101) in the belief that increased contact with librarians, similar to contact with other faculty, improves the students’ chances of success. In connection to the information literacy goals of the library, the group developed a working definition of information literacy and engaged Dr. Anthony Cardoza in discussion; and developing a successful dialogue program with faculty, called Commonalities.

The Spaces and Services group has been identifying and evaluating existing signage, reviewing space, and planning and developing consistent levels of customer service at each service location. We hope that by studying and enhancing the use of the current space, especially in Cudahy, we will improve the overall student experience, and also gather valuable information for the eventual renovation of Cudahy Library.

The Collections team began analyzing the collections, evaluating and revising the collection development policy, planning for and designing a Digital Repository, and preparing for a pilot inventory project for summer 2011. The group has also been spearheading a patron driven acquisitions pilot program, which will make it possible for patrons to more quickly and easily access e-books.
SERVICES:

In order to improve our patrons’ access to not just Loyola’s collections, but also the collections of other libraries as well, we decided to implement WorldCat Local (WCL). This tool from OCLC makes it possible for patrons to quickly locate and request materials from many different libraries, effectively expanding our collections. The team which worked on the implementation represented the entire Library, and involved several members of the Public Services staff. Public Services Division team members included Jeannette Pierce, Ursula Scholz, Jennifer Jacobs, and Fred Barnhart.

Another new service which was piloted in Spring Semester 2011 involved the reference librarians making rounds in the Cudahy Library, away from the IC Reference Desk. The librarians were equipped with iPads so that they can stay in touch with the other service desks, and also to answer patron questions where they are working -- frequently in the stacks and or other study areas of the Library. The Spring semester pilot lasted only for a short period of time, though, and had mixed, but encouraging, success. We look forward to continuing the pilot in the Fall 2011 semester and are reviewing peak student activity data to determine the best times for the “Reference Rounds,” as well as investigating other tablet devices.

The addition of the Digital Media Lab, and the associated new equipment, to the Lewis Library’s space on the 6th floor also has been a success, but it has not diminished the demand by students for checking out the Library’s laptops. We look forward to developing the same synergy between ITS and the Lewis Library that the IC and its Digital Media Lab have developed over the past four years.

The option to place intercampus loan requests through the library catalog (Pegasus) was also a tremendously popular new service for FY 2011. The service makes use of the Voyager Call Slip function, which only began to be utilized at the end of FY 10.

An additional new service launched in the fall 2010 was the offering of service hours in the Library Storage Facility. We feel that this will be safer and more secure for both patrons and collections than our previous policy of checking out a key to the LSF. We also hope that the ability to pick up materials on site at LSF will reduce the number that needed to be retrieved for pickup at Cudahy.

The Pulse Survey, administered in February 2011 and coordinated by University Marketing and Communication (UMC), allowed the University Libraries to partner with ITS to survey a sample of undergraduate students about use of our services. Stand out findings include the fact that respondents were most likely to use the Klarchek Information (86%), with the Cudahy Library as the second most popular facility (75%). For students who use the facilities, 45% do so to study or work alone, while 55% reported using the facilities to hang out with friends. Finally, searchable databases are the most commonly used resource among the sample group, with online journals/newspapers and print books in a close second place.
As part of a national trend, the number of questions asked at the Reference Desk continues to decline as the primary means of connecting students with research assistance. The total transactions at the IC reference desk declined only 5%, though, and our online reference service, AskLive, increased by nearly 31%, a sign that the service remains relevant, even though the context is changing.

Finally, the student laptop thefts in the late spring semester underscored the need for the Library staff to remain vigilant and also to continue cooperating with Campus Safety. It also identified the need to educate the student population about the dangers of leaving their possessions unattended, an all too common occurrence, especially during finals and busy academic times. Campus Safety caught the laptop thief this spring, and new policies and procedures are being implemented to both educate students, and also make the Libraries’ facility less accessible to would-be-thieves.

**INSTRUCTION and PROGRAMMING:**

The University Libraries, in particular the Reference Librarians at both campuses, are frequently called upon to provide instruction about library resources for students. Fall 2010, though, was the first year that the Libraries participated in both UNIV 101, an orientation class for first year students, and UCWR, the first year writing seminar. Jane Currie coordinated the library programming for the UNIV 101 classes, and Niamh McGuigan coordinated for the UCWR courses. First year students being instructed through UCWR classes increased by 33% since FY 2010 (from 2,301 students to 3,078), and overall student participation in library instruction increased 31% since FY 2010 (from 5,356 to 7,042). As with other years, the subject specialist librarians also provided special instruction to upper level classes as well.

The Learning Commons Committee initiated its first formal programming in FY 11. Commonalities, a series which is intended to bring together faculty from different disciplines, along with ITS, library, and other academic support units, to discuss common academic concerns. The programs are moderated by faculty or administrators with an interest in the topic, and a light breakfast or lunch is provided to facilitate the informal atmosphere.

Focus on Teaching – August 2010 and January 2011 – Fred Barnhart and Susan Wardzala both serve on the planning committee. The day long programs are good opportunities for the University Libraries to build relationships with faculty, to highlight the resources we bring to teaching and learning, and also to strengthen our relationships with ITS, Learning Technology and Assessment, Engaged Learning, and the Office of Research Services.
COLLECTIONS:

The collection budget for FY 2011 continued to be tight due to the 2\textsuperscript{nd} year in a row of a flat budget, combined with increases in inflation. That being said, the Libraries have been able to maintain subscriptions and even add some new ones, due to the generous infusion of one time funds by the President’s Office and Provost’s Office in FY 2009 ($157,000) and the combined gifts of a number of Deans in FY 2010 ($437,000, of which $424,000 was used for prepayment to CARLI and EBSCO). The FY 2010 one-time infusion of funds, which was encouraged by the Provost, allowed us to pre-pay and retain subscriptions for FY 2011, and we are hopeful that an increase to our base collection budget in FY 2012 will also allow us to continue our present level of subscriptions, and even improve them.

Notable Additions to the E-Resources Collection for FY 11:

- \textit{Early American Imprints} – The University Libraries and the Law Library cooperated toward the purchase of \textit{Early American Imprints}, the definitive resource for information about every aspect of life in 17th and 18th century America.
- \textit{Times Digital Archive}: A searchable database of the \textit{The Times} (London) newspaper archives covering events from the French Revolution and the American Civil War through to the two World Wars of the twentieth century, as well as civil & political movements, crime, culture, and more.
- \textit{State Papers Online}: A collection of original historical correspondence, reports, memoranda, and parliamentary drafts from ambassadors, civil servants and provincial administrators which present a full picture of Tudor and Stuart Britain.
- \textit{Oxford Journal Archives: Humanities and Social Sciences Collections}: Includes the archival holdings of nearly 100 journals, many of which are already held in print and which are now good candidates for storage or withdrawal.
- \textit{JSTOR Arts and Sciences VIII}: The latest JSTOR collection purchased by the University Libraries.

Other Collections Items:

One of the ongoing challenges of book acquisition is controlling the pace of selection and purchase of titles by the subject specialists throughout the year. Deferred book selection can easily result in a glut of books at the end of the fiscal year, which places great demands on the acquisitions staff. As a remedy we devised a purchasing schedule for the subject specialists to follow, which takes into account the slow and busy times of both the acquisitions staff and the subject specialists. This not only improved the rate of purchasing, but also avoided the rush to spend book funds at the end of the year. By pacing the purchasing evenly throughout the year it is also made it easier to evaluate the funding amounts that have been allocated to each book fund.
Like most academic libraries, we also take advantage of approval plans to streamline the acquisition of certain materials we know will be used by our patrons. We do this with approval plans which automatically order books which match certain preset criteria to match our collections. The approval plans had not been evaluated for some time, so the subject specialists were asked to evaluate the Library’s approval plans in order to improve the relevance of the books being ordered. On a similar note, the Subject Specialists also evaluated the Standing Orders for their disciplines and cancelled many that were no longer relevant, or were being provided through electronic resources. This helped control our expenditures for FY 2011, especially since we had no increase in the collection budget.

Also, coordinated by the Collection Development Steering Committee (CDSC), the subject specialists began the process of reviewing and revising the Collection Development policies for their various disciplines, a process that had not taken place for several years. This marked only the beginning, though, of a process which has since been incorporated into the Strategic Plan Implementation under the Collections Working Group. Similarly, the same groups also began reviewing different formats, including streaming video and e-books, in order to keep up with patron demand. Another topic of special interest to the Strategic Plan Implementation team and the Collection Development Steering Committee, is the subject of patron drive acquisitions models, a means of developing the collections which is rapidly gaining a foothold in academic libraries.

As part of developing a patron driven acquisition model for the University Libraries’ collections, the CDSC also undertook a pilot project during FY 11 to enhance the usability of e-books for the Loyola community. EBL (Electronic Book Library) provides e-book records which are added to the catalog (Pegasus) before purchase. E-books may be borrowed, or leased, by patrons, and are only purchased after being leased multiple times. In other words, the library is able to make more books available and only buys the ones that the patrons really want.

On a less positive note, due to economic considerations the Health Science Libraries initiated a large cancellations project, which also impacted on the University Libraries, given the number of biology, nursing, and even psychology faculty who frequently need access to health science materials. The University Libraries and the Health Sciences Library have improved access across campuses to each others’ bioscience journals in recent years through cooperative subscription and extending access to the other campus, where possible. The two libraries work together closely to legally provide access to each others’ resources, and also to avoid unnecessary duplication.

Finally, through the efforts of Jamie MacDonald, Social Sciences Subject Specialist, and Eileen Black, Government Documents Assistant, the Government Documents collection continues to be downsized in an effort to make the collection more current and user accessible. Jamie and Eileen weeded approximately 1200 duplicate and superseded items from the collection and from storage areas. Jamie worked to reduce our print selection profile from approximately 34.5% to 12.8%, which will significantly reduce the number of
materials the library will need to process in the future. Most, if not all, government information currently originates in a digital format (“born digital”) and the trend in the Federal Depository Library Program (FDLP) is to make information available online whenever possible. This trend has resulted in a decrease in the need to add large numbers of physical items to the collection, but an increase in the necessity of promoting patron discovery of online materials.

SPACE:

The renovated Donovan Reading Room continues to be heavily used for quiet study and reflection by students, especially in the afternoons and evenings. The studious atmosphere was disrupted a few times this past year, though. Once during the renovation of the old unused entrance and highly stylized art deco doors, and again at the end of the spring semester when a group of students initiated a spontaneous “rave,” in the IC and the Cudahy Library as a break from finals. The “Echo Room” also continues to see use for more formal events, such as lectures, wedding receptions, and awards ceremonies.

Another popular space, even though relatively new, is the Graduate Student study space which was provided initially on the second floor of the Cudahy Library, but then later moved to the third floor to make room for the Center for Textual Studies and Digital Humanities during the 2010 summer break. The creation of this space was coordinated by Anne Reuland and co-funded by the Graduate School and the University Libraries. The space originated after multiple requests by graduate students for space which they could use for study and group work.

The second floor space left behind by the graduate students has been taken over by the Center for Textual Studies and Digital Humanities, which puts it closer to the University Archives. Lending the space to the CTSDH promises to provide a good partnership with the University Libraries in terms of digital initiatives. The space is primarily intended for meetings and work by graduate students, but will also include specialized equipment, such as scanners.

The Klarchek Information Commons’ popularity continues to be strong. A number of functions, like Discover Loyola, Weekend of Excellence, Commencement, and Founders Dinner make heavy use of the IC, sometimes taking over the whole building! Multiple departments and committees use the 4th floor for their academic events and meetings, while students make intensive use of the group study rooms (90% full in the evenings), and the six classrooms of the IC are in a constant state of use by classes.
PERSONNEL:

Several members of the staff, both library faculty and paraprofessional staff, were able to participate in professional development activities during FY 2011. The list below is not comprehensive, as it does not include all workshops or programs lasting less than a single day.

**ILA, Annual Conference, Chicago, September 2010** – J. Jacobs, N. McGuigan, T. Ruppman, M. Mansfield (former staff), E. Andrews, E. English, V. Crouther,

**Association of Jesuit Colleges and Universities – Virtual Reference (AJCU-VR), San Jose, CA, October 2010** – T. Ruppman (in place of S. Wardzala)

**Charleston Conference, Charleston, S.C., November 2010** – M. Spring

**ILA, Going Green Workshop, Field Museum, Chicago, IL, October 2010** – J. Jacobs, B. Anthony

**Great Lakes User Group Meeting, Evanston, IL, November 2010** – L. Chang

**ALA Midwinter Meeting, San Diego, CA, January 2011** – D. Givens, F. Barnhart

**Handheld Librarian – Online Conference, February 2011** – T. Radniecki

**Illiad International Conference, Virginia Beach, VA, March 2011** – J. Jacobs

**Association of College and Research Libraries (ACRL), March 2011** – N. Mc Guigan, L. Haas, F. Barnhart

**ACRL Virtual Conference, March 2011** – J. Currie,


**ELUNA, Milwaukee, WI, May 2011** – S. Wardzala,

**NASIG Conference, St. Louis, MO, June 2011** – M. Spring, S. Saltzman,

**ALA Annual Meeting, New Orleans, LA, June 2011** – C. Miesse, L. Chang, T. Franklin, J. Jacobs

New staff were also hired in the Public Services Division. Amy Leung, Late Night Supervisor, was hired to replace Ted Quiballo.
FY 2012 GOALS:

Many of the goals for the upcoming year relate directly to the Libraries Strategic Plan. Some are ongoing and are also being carried over from the previous fiscal year.

- Assess the Libraries’ Collections by using information gathered in the previous two years, including the LibQUAL survey, the OCLC collection analysis, and the ERPC’s Value Assessment, among others. Report should address strengths and weaknesses, in addition to trends and formats that may affect collections in the future.
- Begin revision of the Collection Development Policies, based at least in part on information gathered during the Collection Assessment.
- In cooperation with Library Systems begin work on the Libraries’ Digital Repository.
- 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.
- Increase and enhance library instruction, through the UNIV 101 program and UCWR courses.
- Continue outreach to faculty, through liaison services, to support excellence in teaching and in research.
- Begin to develop tools to enhance use of collections, whether through social media tools like podcasts and screen casts, or more traditional guides to subject research.
- Pilot the Electronic Book Library (EBL) as a patron driven acquisition model, and determine how it can best fit into the Libraries’ collections.
- Continue to provide new programming through the Learning Commons Committee, in particular the Commonalities series.
- Begin to improve customer service by establishing a baseline for each service point, and a minimum standard of knowledge for each library employee, including student workers.
- Improve the use of library spaces through signs, navigation tools, and any renovations that can be made within the Libraries’ budget.
Highlights/summary

- Usage of DVD collection increased 73% following collection relocation
- Improvements to the process for requesting books led to a large increase in intercampus loan usage
- A new Information Commons pick-up location was created
- Service hours were implemented at the Library Storage Facility; usage was small but steady
- WorldCat Local fulfillment options were set up and successfully integrated into workflow
- Organization of materials on Stack Deck C and in Current Periodicals was improved
- A new ESL collection was launched, and parameters for Popular Reading collection were adjusted

Services

At the very end of the previous fiscal year, we began two major new services: browsable DVDs and Pegasus request forms (call slips). As such, this was our first full year of experience with these services. After assessing the impact on workflow, we decided to make minor changes to the procedure for DVD checkout in order to make the process faster. The immediately availability of the DVD collection has been hugely popular and has increased use of the collection by more than 73%.

The option to place intercampus loan requests through the library catalog (Pegasus) has also been tremendously popular. This makes use of the Voyager Call Slip function, which we have never previously utilized. We finished setting up the system at the end of the previous year and so had the chance to work with it during FY2011. Throughout the year we made adjustments and improvements in workflow to improve efficiency and make use of existing staffing to accommodate the large volume of requests, which were almost double the previous year.

Two other new services that we launched in the fall have had more moderate success. In an effort to make our collections more accessible to patrons we decided to implement a new pick-up location at the Information Commons 1st floor. Ursula Scholz worked with Leslie Haas and Jeannette Pierce to identify the best location; set up parameters in Voyager; and provided training and support for IC staff. We had anticipated that being able to pick items up right by the doors would be a valued time-saver for our patrons, but they have not made as much use of it as we expected. We have an average of 62 books per month that are picked up there, which is less than a tenth of the number held at Cudahy (740 per month, on average).

The second new service launched in the fall was service hours in the Library Storage Facility. We felt that it would be safer and more secure for both patrons and collections than our previous policy of checking out a key to the room. We also hoped that the ability to pick up materials on site at LSF would reduce the number that needed to be retrieved for pickup at Cudahy. Unfortunately that has not proven to be the case. Since the facility opened in August of 2010, only 329 books have been circulated from that location, whereas more than 10 times as many (3758) were retrieved for checkout at other locations.

During the fall and spring semesters, we staffed LSF for service 3 days a week, from 11 am to 3 pm. During that time we averaged somewhat less than 2 patron visits per day, with a total of 196 visits over the year. We were surprised to learn that undergraduates were the most frequent visitors, and also that the average length of a visit was only about 5 minutes. Given the minimal usage of the open hours, we recommended shifting to 2 days a week instead of 3. We are testing it over the summer to see if it makes sense for the fall. It appears to be working...
well and we recommend continuing into the fall. It does seem worthwhile to retain limited service hours though, as it meets the needs of some patrons, allows the student workers to complete LSF related projects, and only costs the library approximately $80 per week in staffing.

The department was also heavily involved in the implementation of WorldCat Local. With input from the implementation team, Jen Jacobs populated the matrix that controls status display and delivery options in WorldCat Local. Based on an item’s location and availability, users are directed to the Pegasus call slip request form, to ILLiad, or to the library’s full text link resolver. There were several challenges along the way. First, we discovered that we cannot combine the holdings of the University Libraries, Law, and Health Sciences in a single relevancy tier because WCL cannot integrate multiple Voyager records for the same item. Also, it was feared that WCL’s screen scraping technology was causing Pegasus to crash repeatedly. The implementation team therefore considered switching to a Z39.50 search, which required revision of the matrix. Ultimately, the Pegasus problems were resolved and the team decided in favor of screen scraping. As OCLC continues to develop WorldCat Local with features such as the one-click article request, further revision of fulfillment options may be necessary.

Despite the new WorldCat Local catalog, interlibrary loan borrowing only increased by 5.15% (from 20,162 to 21,201). Although we did not see dramatic increases in ILL borrowing, users have been submitting requests via WorldCat Local. Percentages peaked in January 2011, with just under 50% of ILL requests coming from WorldCat Local (see chart below).
Collections

After we removed the grating around Deck C during the previous fiscal year, the organization of materials in that area became more of a priority. At the time there were two different location codes that were interfiled in that area, while folio-sized items were not listed as a separate location. We began the project by removing any item that was not physically oversized and relocating them to the main stacks. Next, a location code was created for the folio items (called Cudahy Supersize). The last phase of the project, which is ongoing, is to move oversize items out of the main stacks and into Deck C. Housing all the large items together will help keep the stacks neat.

We also worked together with the SERM department to review the location and retention policies for newspapers. We were able to relocate the daily papers from an obscure location in Deck B, to the more visible and accessible current periodicals location. As part of that same process we elected to have a magazine rack with a revolving assortment of periodical issues displayed to be more eye-catching and accessible.

One last project involving the stack decks was the reorganization of the microfilm. Although we originally intended to put all of the cabinets on one floor, building infrastructure would not support the weight. Instead, the Stacks Supervisor rearranged all of the microfilm to be in call number order.

After receiving several requests from patrons for materials to support students who are working on their English language skills, Ursula Scholz worked with Tracy Ruppman, Jamie MacDonald, and Ling-1 Chang to build a new collection of graded readers for English language learners. Since these materials are intended for use by a specialized population, we wanted them to have a discrete location. We achieved this by shelving them near the popular reading books. The collection is (and will remain) small, with 71 titles currently. In the first 3 months of availability, these items have been checked out 38 times, an impressive number for such a new collection.

We also decided to make some changes to the popular reading collection, after analyzing the first year of usage. As of March 2011, rather than purchase from the New York Times bestseller list, we will purchase from the American Bookseller’s Association National Indie Bestsellers list. We felt that these titles better reflected the reading interests of our community. Indeed, circulation rates, which were already high, have increased by 15%.

Staff

Two members of the Access Services Department completed master’s degrees this spring. Beth Andrews received her Master of Library and Information Science from University of Illinois Urbana-Champaign in May 2011, and Anna Gentry received a Master in Women and Gender Studies from Loyola in May 2011. Anna Gentry also submitted her resignation effective June 24th, 2011, after eight years of employment at Loyola. A search is underway to fill the position.

Beth Andrews spent much of 2010 chairing a Public Relations task force charged with promoting WorldCat Local and applying for the John Cotton Dana Library Public Relations Award. As chair of the committee, Beth took responsibility for planning and leading meetings, coordinating the application process, and writing the project narrative. The project took nearly nine months and involved a publicity campaign, event planning, formal assessment, and the creation of a written narrative and scrapbook, which was submitted in early December. While the application did not win the John Cotton Dana award, the project proved successful for several reasons. First, the final assessment showed a massive increase in WCL usage over the month of September, and questions recorded in LibStats suggested that student developed a basic but solid understanding of how to use the new catalog. Second, Beth gained valuable experience in marketing, assessment, and leadership.
Jen Jacobs has served as a member of the planning committee for IFLA’s 12th Interlending and Document Supply Conference, which will be held in Chicago in September of 2011. She has been primarily responsible for planning related social events. Her involvement has provided a valuable opportunity to interact with ILL colleagues from Northwestern, UIC, University of Chicago, and Notre Dame.

In addition, several Access Services staff have participated in the continuing strategic planning process. Karen Cherone is serving on the SPI Team for Services and Facilities, and Bonnie McNamara is chairing a subgroup of that committee that has been charged with customer service training. Ursula Scholz serves on the Collections SPI team.

**Transactional Statistics**

Because of the major changes in procedures and systems for intercampus loan and document delivery, we will need to shift how we categorize types of activities in the future. By switching to the Voyager Call Slip system the Intercampus Loans are being tracked by Voyager, instead of manually as before. In addition we are now using ILLiad to track online document delivery. Both of these changes require a revision to our statistics tracking. Making the categories as similar as possible to previous tracking methods results in the following comparisons:

<table>
<thead>
<tr>
<th></th>
<th>FY2010</th>
<th>FY2011</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charges</td>
<td>96,331</td>
<td>88,059</td>
<td>-8.59%</td>
</tr>
<tr>
<td>Renewals</td>
<td>66,884</td>
<td>59,421</td>
<td>-11.16%</td>
</tr>
<tr>
<td>Discharges</td>
<td>113,036</td>
<td>110,130</td>
<td>-2.57%</td>
</tr>
<tr>
<td>Reserves Charges</td>
<td>18,113</td>
<td>20,200</td>
<td>11.52%</td>
</tr>
<tr>
<td>AV Bookings</td>
<td>3,717</td>
<td>6,439</td>
<td>73.23%</td>
</tr>
<tr>
<td>ILL Borrowing</td>
<td>20,162</td>
<td>21,201</td>
<td>5.15%</td>
</tr>
<tr>
<td>ILL Lending</td>
<td>13,834</td>
<td>13,136</td>
<td>-5.05%</td>
</tr>
<tr>
<td>ICL Borrowing</td>
<td>7,348</td>
<td>14,683</td>
<td>99.82%</td>
</tr>
<tr>
<td>ICL Lending</td>
<td>1,762</td>
<td>2,100</td>
<td>19.18%</td>
</tr>
</tbody>
</table>

In the future I intend to track document delivery and paging as separate categories, as well as changing how we track LSF retrievals. Using this new method, the figures would be:

<table>
<thead>
<tr>
<th></th>
<th>FY2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL Borrowing</td>
<td>20716</td>
</tr>
<tr>
<td>ILL Lending</td>
<td>13136</td>
</tr>
<tr>
<td>Document Delivery</td>
<td>1839</td>
</tr>
<tr>
<td>ICL Borrowing</td>
<td>5421</td>
</tr>
<tr>
<td>ICL Lending</td>
<td>3337</td>
</tr>
<tr>
<td>Paging</td>
<td>4137</td>
</tr>
</tbody>
</table>

**Notable changes to transactional statistics:** During the previous fiscal year, we saw a large increase in renewals, which we felt was due to the special project to clean up outstanding books on faculty accounts. The drop this year brings us closer to the 2009 figures. Other changes are to be expected; having the DVDs accessible to patrons has increased their usage, and the simplicity of requesting books via the OPAC, as well as the new paging service, has significantly increased ICL transactions.
Status of Goals from 2011

- Institute service hours at LSF (service hours commenced August 2010)
- Implement Billing Manager feature in ILLiad in order to streamline invoicing and track payments for loaned materials electronically (completed January 2011)
- Evaluate methods of submitting requests for AV materials (completed in conjunction with the revision of all web forms, January 2011)
- Review and revise departmental web pages (all pages have been reviewed and content edits sent to the web team)
- Add carrel keys to Voyager (completed August 2010)
- Set up policies and procedures for locker assignments (we were not able to secure funding for lockers at this time)
- Create a new hold shelf at the Information Commons, create policies and procedures, and provide training (implemented August 2010)
- Implement new tiered student employee program (LEAD) (piloted in Spring 2011)
- Create explanatory call number handouts for patrons (completed December 2010)
- Create a preferred vendor list/FAQ for streaming video (although not yet widely publicized, we have established an internal list and have also begun subscriptions to several digital media packages)
- Revise and update ILL student training manual (completed May 2011)
- Transfer selected oversize main stacks books to Deck "C" (in process, although delayed in favor of the inventory project.)

Additional Accomplishments

- Assisted with WorldCat Local implementation (beta site launched in June; official usage began August 30)
- Worked with the Head of Reference and the Director of the Information Commons to create a pilot project for student cross-training (called LEAD) (piloted in Spring 2011)
- Worked with Eben English to revise all the online circulation forms (completed in February 2011)
- Worked with Chulin Meng to purge old patron records and to strip SSNs from current records (initial purge completed during winter break, problem records continue to be cleaned up)
- Worked with Kevin Kennedy to set up policies and procedures for online fine payment website (completed)
- Worked with graduate school to provide copyright information to students working on their dissertation (first workshop given August 2010; I continue to participate in these information sessions)
- Relocated one of the older microfilm machines to the Storage Facility to permit use of microfilm materials on site (completed)
- Worked with Nicole Meehan from the Alumni Office to update and codify alumni library access (completed)
- Worked with fellow Public Services Department Heads to recommend and implement changes to statistical record keeping (LibStats and headcounts) (completed)
- Conducted usage study of the mezzanine and video viewing lounge (completed during Fall 2010)
- Worked with Purchasing to review and select a new photocopier contract (completed)
- Assisted with planning and implementation of enhanced security measures following an uptick in laptop thefts (completed)
Goals for 2012
The goals outlined below support the library’s strategic plan, primarily the first and second directions: “Re-envision the collections,” and “Re-align services and facilities to meet established and emerging needs.” Individual actions that the goals support are listed below.

1. Inventory selected sections of the Cudahy Main Stacks
   Define, re-define, and broaden collection parameters
   Improve physical access to the libraries and our collections.

2. Provide support and assistance during the Information Commons’ 24/5 hours pilot
   Create a variety of flexible spaces that meet the educational and social needs of the users
   Improve physical access to the libraries and our collections.

3. Hire and train ICL assistant
   Improve delivery of person-to-person services
   Improve physical access to the libraries and our collections

4. Shift reference collection
   Improve physical access to the libraries and our collections.

5. Investigate WCL course reserves
   Improve virtual access to the collection and services

6. Implement Swank streaming video reserves collection; establish policies and procedures and enact a system for tracking licenses
   Define, re-define, and broaden collection parameters
   Improve virtual access to the collection and services

7. Work with Ricoh, Purchasing, and ITS on planning for and roll-out of new photocopiers
   Improve delivery of person-to-person services

8. Establish parameters for a pilot project to expand online delivery of Loyola-owned articles and book chapters to Loyola students and faculty
   Improve virtual access to the collection and services

9. Investigate possibility of creating a proxy patron system in ILLiad
   Improve delivery of person-to-person services

10. Coordinate withdrawal of materials under Galvin and participate in planning for future use of that space
    Improve physical access to the libraries and our collections.
    Create a variety of flexible spaces that meet the educational and social needs of the users.

11. Investigate possibility of purchase-on-demand for audiovisual materials.
    Define, re-define, and broaden collection parameters

12. Investigate the potential for permitting patron-initiated recalls through Pegasus
    Improve virtual access to the collection and services
The Administrative Services Department is primarily a support unit and this report reflects the department’s focus on supporting and facilitating the Libraries’ operations.

Facilities. There were no major projects in the buildings this year but we were able to make small improvements, including:

→ Touched up paint in public study areas of Cudahy Library, courtesy of LUC Facilities.

→ Painted Dean’s outer office.

→ Touched up Lewis Library paint throughout the public areas; repainted the 9th floor reading room and all 9th floor group study rooms, and installed whiteboard wall covering in all 9th floor group study rooms.

→ Added outlets throughout the Cudahy Library mezzanine

→ Added two tables to the Donovan Room, increasing capacity by 10%.

→ Installed original art on loan from the Department of Fine and Performing Arts, thanks to David Givens.

→ Added lounge furniture from CFSU, Halas, and Corboy Law Center. Although this furniture may not really improve the décor, it does increase comfort and variety of seating.

→ Added reading chairs from Corboy Law Center throughout the stack decks. These chairs are fair in appearance and are sturdier than many of the existing reader chairs in Cudahy Library.

→ Installed Welcome to Cudahy Library sign and updated IC signs to reflect room changes.

→ Improved arrangement for study tables, new books, leisure reading, and current newspapers; this project was accomplished by the Access Services and Acquisitions Departments.

Year end purchases included 150+ chairs for public study areas in Cudahy Library, to be installed in FY12. We hope these provide an improvement in both comfort and appearance in two large study areas, the 1st floor computing area and the mezzanine.

The University Facilities Division continued its planned masonry and roof repair on Cudahy Library during FY11, with additional work scheduled for Summer 2012. Water is a continuing problem in the Lakeshore campus buildings, with leaks in the Cudahy Library mezzanine storage areas, water backups in the CL lower level plumbing, leaks in windows and masonry in the Information Commons, and leaks in the Library Storage Facility. Fortunately, we have not had any water damage to collections during FY11. LUC Facilities has plans for a major to solve the Sullivan Center leaking problems, although as far as I know,
the work is not imminent. Facilities and Housekeeping are always very helpful dealing with the aftermath of leaks and water problems.

Budget.
Despite considerable effort, the year end budget closing did not go as smoothly as it should have. For the upcoming year, we may want to consider making exceptional equipment purchases earlier, preparing to slow other spending considerably in June, and making sure that the business manager and I are informed of any purchases and expenditures. It would also be helpful to prepay as much June professional travel as possible and to require that all June travelers provide more detail on their planned spending. As happened at the close of FY10, the libraries intended use of year end collections funds did not work well with the university’s accounting practices, and the interested parties will confer in Fall 2011 to plan a more satisfactory approach for the close of FY12.

Human Resources
There were no personnel changes in Administrative Services during FY2011. The libraries filled several support staff position during FY11:

Serials Assistant Ray Clark joined the staff in September 2010.
Archives Associate Ashley Howdeshell joined the staff in November 2010.
Preservation Associate Sandra Hernandez joined the staff in November 2010.
Cataloging Assistant Kim Medema became Acquisitions Associate in January 2011.
Cataloging Assistant Kelsey Williams joined the staff in April 2011.
IC Supervisor Amy Leung joined the staff in January 2011.

Each of these vacancies attracted a large applicant pool including a number of qualified candidates; the hiring supervisors worked hard to screen and select.

The IC Monitor position has been held open since April 2010 and at this writing we are preparing to redefine and fill the position as an IC Supervisor position for the overnight shift in Fall 2011.

The checklist of steps required to fill a vacant staff position was completed and posted to the staff web. The information has been useful for organizing the work involved in filling the positions listed above, and the checklist should be updated in FY12.
Assessment

ACRL and NCES statistics FY10 questionnaires were completed in FY11. All of the Department Heads as well as Sherri Saltzman and Vanessa Crouther contributed to this compilation. Internal assessment activities included producing Opinio surveys for several informal evaluations, and producing the internal version of the faculty and staff opinion survey.

Communication and other support

Intermittent efforts to use the staff web site for Facilities and Administration information were not apparently noted by staff, but were at least a convenient way to be sure the information was stored in a location available to the permanent staff.

Every effort was made to keep library staff informed of work in the buildings or on campus that would affect their work lives. The news heard in the Monday Morning Facilities meeting can be important to our staff. Email continues to be the best method of communication for this information.

Successful special events in the Donovan Room this year included the Fall 2010 Convocation Walk, the Library Friends reception for the campus architecture exhibit, and the Founders Awards Ceremony. With increased demand for the room in the upcoming two years, further streamlining of the arrangements process is needed. The Library Facilities and Admin Department also provided frequent administrative and troubleshooting support for internal and external events such as the Faculty Publications celebration and WorldCat Local promotion, Founders Day events, and commencement receptions.

Update on goals for FY11:

- **Update and replace temporary room and directional signs in Cudahy Library in August 2010.** With the help of Ross Zafar, some signs were replaced, most were not.

- **Improve appearance and comfort in the mezzanine.** LUC Facilities kindly touched up the paint in the mezzanine and other public areas of Cudahy Library during Summer 2010. The library contracted with R&R Construction to add outlets throughout the mezzanine. Several tables were removed and the room was rearranged to make it easier to move through the room.

- **Review renovation plans and prepare for next phase of planning.** This project is on hold.

- **Resolve microform location issues.** No progress to report.
Clear storage areas 016 and 039. Facilities students and Housekeeping did make some progress on these areas, and the work is ongoing. Although a considerable volume of material has been cleared out, new gifts and withdrawals are continually added.

Projects for FY2012:

- Revise and redistribute the Vacancies Checklist.
- Resolve the definition of medical paid time off for librarians.
- Compile cost estimates for several projects, including painting Cudahy Library Access Services and Technical Services offices, painting Lewis Library staff areas, and adding electrical outlets around the perimeter of Cudahy Library stack area, i.e. in the assigned carrels.
- Replace Cudahy Library room signs with updated signs using the method used for the art installation labels, a simpler format that can be done within this department.
- Use the Staff Web to record facilities information currently recorded elsewhere and not yet available to all staff, e.g., facilities requests procedures, announcements also sent by email, and schedule of events or projects in Cudahy library. (Will require improved expertise with Drupal but I do not think this will be difficult to develop.)
- Additional projects determined by LLT.
Executive Summary

The Klarchek Information Commons had a successful FY2011. The IC offered or initiated a number of services central to the mission of the University Libraries and the University. We made sure the spaces and services were used and promoted; we sought new ways to bring in our students and faculty and encouraged innovation by users and staff. We continually sought out ways to improve our programs, spaces and services. We have tightened security to ensure the safety of our students, worked with campus partners to offer programs and services that emulate the learning commons philosophy and listen to our users about small ways to improve their experience in the IC. The satisfaction of our users continues to be the litmus test for any changes that we make to the services or spaces in the IC.

The biggest challenge faced by the IC this past year was security. Towards the end of the spring semester, there was a rash of laptop thefts in the IC and Library. The IC worked with the Library, University Administrations and Campus Safety to review procedures and implement new measures to protect the safety of our users and their possessions. We enter the new fiscal year, with heightened security awareness and new practices in place that we hope will keep our users safe and productive during their time in the IC.

Highlights

Policies and Procedures

- Reviewed and revised policies as they related to services provided in the Information Commons. The MOU was also reviewed and updated by the IC Steering Committee.
- Updated procedures for lost and found items and worked closely with Campus Safety to schedule pick up of items that contained personal identification data or were considered valuable (i.e. jewelry, sunglasses, ipods, etc). Over the course of the year over 200 items were handed in and either returned to the user or given to Campus Safety.
- Updated Community Access policy to require all users to present a photo ID in order to use the facility. In the past, alumni and reciprocal users and guests of the Loyola Community were exempt.
- After doing head a count of users in the building since opening, the decision was made to discontinue this practice as of January 2011. The data was not being utilized and it was determined that there were other methods to gather data on how the IC was being used by the Loyola population.

Staff

- Hired Amy Leung in January 2010 after the resignation of Ted Quiballo
- Regular training sessions were offered for IC staff (students and supervisors) focusing on customer service, EasyLobby, IC procedures and WorldCat.
  - In light of the security issues that took place in the spring, individual training sessions were held with each student assistant to review policies and procedures and to highlight new security practices.
Services and Programming

- Collaborated with Access Services over the course of the year on the hold shelf in the IC near the entrance. In the fall semester 2 book cases were utilized to hold the books for users who requested items from the collection. Due to lack of demand, the book cases were replaced with a book cart and placed at the IC first floor desk.
- Continued to work with CUERP to sponsor a documentary film/discussion each semester focusing on environmental and sustainability topics. Both events were well attended and the partnership continues to flourish.
- Worked with the CUERP intern and the chair of the Library’s Sustainability Committee to identify ways to encourage recycling in the IC. The Library purchased 4 additional steel recycling containers to place out on the floors and removed many of the garbage bins on the floor.
- Met with the staff of the Writing Center, ResNet and Faculty Black Board support to discuss their needs and review their use of the IC.
- Coordinated with the Office of Special Events for Founder’s Day Activities, Graduation and Convocation.
- During the blizzard, the IC remained open (with shorter hours and a skeleton staff) to provide students with a safe place to study.

- Worked closely with the Library and IT to develop a proposal to expand the hours of the IC to 24/5 starting Fall 2011. The project was approved and will be a pilot for the 2011-2012 academic year.
  - Wrote a position description for an Overnight Supervisor
  - Wrote a position description for Overnight Student Assistants

Facilities

- Removed the desk monitor arms for the computer screens to facilitate line of sight for staff at all three service desks.
- Added touch screen kiosks at the 2nd and 3rd floor desks for Group Study Reservations and IC/ITS Directory Information.
- Worked with Jeannette Pierce and Adam Smeets to identify office moves and consolidations that will facilitate better use of the space in the IC to meet student needs:
  - Rooms 229 and 202 (Helpdesk)
    - Move the Helpdesk staff to Room 202
    - Statistics Advisor continues to use room 229
    - Move the Assisted Learning Room (Room 316) to 229
      - 316 is put back into the Group Reservations System
  - Room 204
    - Locate Blackboard Support in this room
  - Room 211 (Reference Consultation)
    - Reference Consultation is moved to Room 211
  - Room 332 and 314 (Video Conferencing Room)
    - The equipment in 332 is not used very often, the room sits empty the majority of the time.
    - Move the equipment to Room 314 for use by ITS and Library.
    - Put 332 back into the Group Study Reservation System
• Updated signage throughout the building to reflect room changes and refresh the look of some of the older signs. Worked with various Library and University groups to promote services and programs. (Examples: Donuts with the Dean, Emerging Technology Committee Workshops, Reference Workshops, Commonalities, CUERP Film Series, etc.)

Goals

2010-11
• Work on improving the customer service experience.
  ▪ Students received periodic training on best customer services practices (Ongoing)
  ▪ Improved Customer Service was one of the goals identified by the Library’s Strategic Plan and the IC staff is working with the SPI teams to improve customer service at all service points in the IC
• Assess the When To Work Scheduling Program
  ▪ The software has been renewed for another year and continues to help streamline the scheduling process at the beginning of the year and is utilized by student staff to help with desk coverage throughout the year.
• Work with Library Departments to implement LEAD program for undergraduate library employees
  ▪ After working with the Heads of Access Services and General Reference, the project was implemented on a small scale. However, due to other priorities, this particular project has not been developed further and upon reflection the decision was made to focus on other ways to improve customer service and referrals between departments within the Library.
• Explore ways to improve communication between supervisors and library departments.
  ▪ We continue to use IM, e-mail and Blackboard to communicate with student employees, ITS and Library Departments. The managers within the IC met regularly during the year to discuss various issues related to the daily operation of the building.

2011-2012
• Work closely with Library Administration and ITS to launch 24/5 this academic year.
• Review the IC website and identify areas that need updated to reflect changes in policies, procedures, usage and services offered.
• Complete the office moves started over the summer(2011)
• Monitor the new security procedures and modify as needed, identifying areas that can be improved or strengthened. Work with Campus Safety and other groups on campus to educate users regarding safety issues related to their personal belongings and themselves.
• Launch a variety of assessment activities to monitor the use of the facility and to identify compliments and concerns from our users.

Statistics:
The 4th floor is a popular space on campus, because of the upgrade to a new version of Groupwise, data was lost regarding the use of the 4th floor for the first half of the year under review. However, monthly statistics are available for January-June 2011:
The Information Commons and Cudahy Library are destinations for many in the Rogers Park Community. During the last year, 7,870 visitors were logged into Easy Lobby. (Note: This number is actually higher; it was in May 2011 that we began to log alumni, reciprocal users and guests of Loyola community members into Easy Lobby. In addition, this number does not include guests who came to the IC for an event on the 4th floor or during special occasions (Founders Day, Graduation, etc.).)

Gate Counts: At this time the requested gate counts were not received from Campus Safety.

Group Study Room Usage: In the academic year approximately 26,855 reservations were made. Of those: 17,335 were for the 4 person rooms and 9520 were for the 6 person rooms. The number of available group study rooms was slightly smaller than the previous year, resulting in a slight decrease in the overall number (Previous year was 27,631). However, usage was at approximately 90+% starting at 4pm in the evenings and rarely was a group study room available in the late afternoon or evening a month into the academic term.
As we worked through the challenges and opportunities of the 2010/11 school year, we reaffirmed our commitment to quality service. We stayed open till 2:00am during Fall and Spring semester final exams and students appreciated these extra hours for study. Staff accomplishments have run the gamut from participating in Ignatian Service Day activities to increasing one-on-one instruction for students, meeting with Faculty at Orientation and Department meetings and attending both University and Library events throughout the year, such as Commencement, workshops on Crucial Conversations and Making Meetings Work, and attending the Speaker Series programs.

**Departmental Goals for the past year & Status**

Much effort was put into accomplishing goals this year. New chairs replaced worn ones in the Circulation and Reference service areas. Other than directing students to the new Digital Media Lab, its impact on Circulation Desk staff has been minimal. Locations were identified for two DVD players and they were installed on the 9th floor in Rooms 913 and 919. An electronic tracking system for the circulation of Reserve materials and laptops, similar to LibStats, was prepared by the Library Systems department and installed on Circulation desk workstations. This replaced the paper version of tracking usage of these items. Weeding of duplicate copies from the Lewis Library collection continues, although at a much slower pace due to lack of time and other constraints. It will continue at a slow, but steady, pace over the course of the next year and will free up shelf space on the 8th and 9th floors of the Library.

A few goals were not completed. A receipt printer for the Circulation desk was purchased two years ago. We would like to see the Systems Department make this a priority. Installing this will save paper and add to the recycling efforts of the Library and the University.

We are still interested in the following possible goals: investigating the possibility of getting a browsable DVD collection and a “Popular Reading” collection.
Projects completed & other highlights

Lewis Library won first prize in two campus-wide “Recyclemania” efforts. Staff generously donated clothing, toys and toiletries to a needy family of four during the annual Christmas gift giving event and to the School of Social Work’s school supply fundraiser. Several staff attended EVOKE events and EMERGE workshops at both the Lake Shore and Water Tower Campuses, throughout the school year.

Group Study rooms were painted and new dry-erase wallpaper was installed. This replaces the smaller dry-erase boards and allows for a larger surface for writing. Some worn lounge-style chairs were replaced with others retrieved from the 12th and 13th floors which are in the process of being remodeled.

We hosted two Practicum students from Dominican University’s School of Library and Information Science during the Fall and Spring semesters: Emily Majeski (Fall 2010, supervised by Taya Franklin) and Ted Mulvey (Spring 2011, supervised by Tracy Ruppman). Both reported that they “could not have had a better placement than Lewis Library”.

At the request of the Family Business Center we recommended Jeanette Mancusi (former Practicum student) to help organize their library. Initially hired for three months, her contract has recently been extended for one year.

Water Tower Campus Life asked us to find a prayer area for Muslim students in Lewis Library. A space on the 8th floor was identified and signage installed.

Staff also had personal accomplishments. Among them: Tracy Ruppman was appointed to IACRL newsletter editorial board; Terry Cornelius was appointed to the “LUC & ME” a Human Resources mentoring program for newly hired staff members; Bernardine Williams was recognized for 25 years of service to the University; Aparna Ghosh participated in “Step It Up Loyola!” and walked well over the recommended 10,000 steps a day.
Basic Statistics on work completed and/or patrons served

**Instruction**

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<th>Session Type</th>
<th>Number of Classes</th>
<th>Participants</th>
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<tr>
<td>Instruction</td>
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<td>2160</td>
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<tr>
<td>Orientation</td>
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<td>719</td>
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<tr>
<td>RBA</td>
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<td>135</td>
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<tr>
<td>Tour</td>
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<td>45</td>
</tr>
<tr>
<td>Workshop</td>
<td>19</td>
<td>66</td>
</tr>
</tbody>
</table>

NOTE: There was a 49% increase in Instruction sessions this year.

**LibStats**

2011: 2,459 Reference Questions answered (37%). The other 63% of questions received were related to Services, IT/Mechanical, Directional and Other.

**Circulation**

<table>
<thead>
<tr>
<th>Gate Count</th>
<th>FY11: 251,997</th>
<th>+17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charges/Renewals</td>
<td>FY11: 36,824</td>
<td>0%</td>
</tr>
<tr>
<td>Reserves. 2hr/Room</td>
<td>FY11: 15,658</td>
<td>+ 1.03%</td>
</tr>
<tr>
<td>Reserves. 3/7 Day</td>
<td>FY11: 290</td>
<td>- 9.94%</td>
</tr>
<tr>
<td>Laptop</td>
<td>From 8/30/10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Apple = 851</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dell = 1,465</td>
<td></td>
</tr>
</tbody>
</table>

**Department Goals for 2011/12**

- Investigate possibility of using same electronic Room Reservation system used in the IC for the Group Study rooms at Lewis. This will replace the current system.
- Investigate need for and establish a browsable DVD and Popular Reading collection.
- Increase usage of e-books and digital repository by promoting to faculty, students and staff at the Water Tower Campus.
- Establish working relationship with new Deans at the WTC (Kathleen Getz, Business, and Darrell Wheeler, Social Work) and Chair of Criminal Justice & Criminology (Deborah Baskin).
- After purchase of iPad2, explore ways in which Reference Librarians can use it to assist users.
- Based on Strategic Plan, prepare a virtual or audio tour of Lewis Library.
- Investigate need for establishing a formal program for residents of “The Clare” by which we offer basic classes such as “Basics of Word processing” and “Facebook” etc.
- Continue to improve collections and space for students by:
  o Compacting current periodicals on the 6th floor and shifting Curriculum and Reference collections.
  o Withdrawing index titles in Reference that have been replaced by online databases (Readers Guide, Education Index, Business Periodicals Index etc.)
  o Exploring possibility of removing one range of shelving in Reference area to make space for possible addition of another Group Study Workstation.
- Continue to weed duplicate titles in Lewis main stacks as time permits.
- Investigate and install a vending machine for school supplies on the 6th floor. (non-food vending machine).
- Revisit the feasibility of getting a portable laptop cart for use in classrooms. The computer labs in Rm. 1402 and Rm. 709 have been removed, so we will have a much harder time getting 710 for instruction.
Executive Summary

Reference and Research Assistance

The Reference Department continued to staff a reference desk and a consultation office in the Klarchek Information Commons (IC) as the primary reference service points for the Lake Shore Campus (LSC). During the academic terms, desk service was provided 78 hours a week with librarians present 64 of the 78 hours. In addition to answering questions in-person and by phone, librarians and reference assistants answered questions that came through the Loyola queue of the AskLive chat reference service and Text-a-Librarian questions.

- Total transactions at the IC reference desk declined only 5%
- AskLive chat reference questions increased by almost 31% (not defined by location)
- Text-a-librarian statistics decreased and remains a marginal service in terms of total number of transactions

In April 2011, we dedicated one week to distributing a reference service assessment survey. Stephen Macksey coordinated the creation of the assessment survey. Survey results are included in this report. Additional comments included:

- “Jamie MacDonald was an amazing resource! I had come to a dead-end with an online search for local newspapers that service the North Chicago neighborhoods of Rogers Park, Edgewater and Uptown. After we spoke, Jamie conducted research re this, and called me back promptly. He provided numerous leads (communications databases; online resources; suggestions for follow-up) that were quite helpful for me. Job well done!”
- “Jane Currie was the friendliest and most helpful librarian I have interacted with in my 8 years of undergraduate and graduate work (2 at Loyola)!”
- “It was a great help to me because im not to good with computers and searches. I know it will help me create a better paper. The lady who helped me was respectful and patient. Seemed as cheerful as one could be helping people with such things.”

In November 2010, the Department proposed a Reference Rounds pilot as a means to explore how reference librarians equipped with mobile technology could be both visible and mobile within our library spaces in order to assist patrons at a point of need. The actual pilot began in April 2011 with an iPAD and continued with a tablet PC from June – August 2011. Though the level of activity during the summer months has not offered the opportunity for many interactions, librarians have had the opportunity to become comfortable with the model and the equipment and will continue the pilot in fall 2011.
Instruction and Programming

Librarians are dedicated to providing meaningful instructional services that meet the general needs of Loyola students and faculty as well the more advanced needs of our assigned liaison areas. Instruction statistics for both the WTC and LSC Libraries are included in this report. Here are some basic numbers for the LSC:

- 257 total instruction sessions (includes UCWR)
- 195 UCWR sessions
- 184 Research Appointments

The Reference Department leads the Libraries' efforts to help students develop information literacy skills and to provide the information students need to use the library effectively. Last summer, in consultation with Terri Thomas in Academic Advising, we began planning to incorporate a library component into UNIV 101. As a new area of involvement for the libraries, the work for UNIV 101 involved significant planning, instructional design, and the creation of new materials. With input from members of the Department, Jane Currie created a variety of instructional materials for use by UNIV 101 instructors, including two screen casts and an information ethics class activity. In December, we distributed a survey to UNIV 101 instructors seeking feedback on the content provided, which we used in discussions and planning for FY12.

Niamh McGuigan coordinated the librarians’ work with the University College Writing Program (UCWR). In addition to the traditional single class period session, we added a new fifteen minute introductory session with each section two-three weeks prior to the longer session; we also developed a more standardized approach to the information literacy content provided in all library instruction sessions. One of our key objectives for UCWR was to spend more time discussing evaluation of sources. To assist in this effort Niamh developed a source evaluation exercise which librarians could use in class and UCWR instructors could choose to use as an assignment.

Jamie MacDonald assumed the role of coordinating the scheduling and promotion of the general workshops offered by librarians in the fall and spring semesters. The following programs were offered by reference staffing in FY11:

- 10 Ways to Improve Any Academic Writing Project
- Accessing and Using Social Science Data Sets
- Becoming an EBSCO Power User
- Cited Reference Searching
- Everyone can be a Good Researcher: Using Pyramid Research
- Faculty Forum: Sabin Collection of Americana
- Getting the Best out of JSTOR
- Google Scholar
- Introduction to RefWorks
- Medical Research: CINAHL Workshop
- RefWorks Advanced
- Research Alerts
- SimplyMap: A User Friendly Tool for Mapping Data
- The Five Secrets to Reading Your Writing Assignment
- Top 5 Things You Need to Know about WorldCat Local
- U.S. Government Information @ Your Desktop
Reference Collection

Reference collection activities included:

- Continuing to weed outdated print material
- Continuing to purchase new reference materials online as much as possible
- Purchase of several online versions of retrospective indexes to replace print copies in our collections, as well as a large number of literary criticism volumes online

In summer 2010, Jane Currie worked with Access Services and our Reference Graduate Assistants to implement a consistent means of gathering browse counts for materials in the reference collection which will allow us to better assess the use of our print collection in coming years.

Government Documents

Jamie MacDonald continued to meet regularly with Jeannette Pierce and Library Administration to discuss the future of our government documents collections. In FY2011, we continued to reduce the number of physical items received and to weed duplicate, superseded, and ephemera materials. Areas of emphasis for government documents continued to be:

- Reducing our existing print Federal collection
- Increasing the visibility and accessibility of government publications
- Developing a professional network to learn from other depositories

Details about these activities can be found in Appendix A.

Other

The Reference Department continued provided volunteer opportunities for current and new MLS students with a Loyola affiliation. Niamh McGuigan coordinated a volunteer experience for Lucy Robbins, staff in our Law Library, who worked evenings and weekends at the Reference Desk in spring 2011. Jane Currie coordinated a summer volunteer experience for Hilary Bussell, Loyola MA in Philosophy and current MLS student at the University of Illinois.
Statistics

Reference Assessment Summary

During the week of April 13 – April 18 reference desk staff asked patrons to complete our new reference services feedback form. Requests to respond to the survey were distributed either with a handout or e-mail distributed by the individual helping the patron. In addition, a QR code option was posted at the desk. We received seven responses during the assessment period. We did not track the total number of feedback requests distributed. A spreadsheet summary view of the specific responses is below. Note that 5 is the highest rating on the 1-5 scale used in the feedback form.

<table>
<thead>
<tr>
<th>Date</th>
<th>How was assistance provided?</th>
<th>How did you hear about the service?</th>
<th>Was assistance helpful?</th>
<th>How easy was it to contact us?</th>
<th>How likely are you to use this service again?</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/13/11</td>
<td>Telephone</td>
<td>LUL Website</td>
<td>5</td>
<td>5</td>
<td>5</td>
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<tr>
<td>04/13/11</td>
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<tr>
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<tr>
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</table>

Reference Service Statistics

The Reference Department collects statistics related to service at all service desks, as well as statistics on subject specialist reference. 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. Reference transactions declined only slightly from the previous year. Reference transactions through the AskLive virtual reference service and questions sent directly to subject specialists via e-mail both increased in FY11.
Comparison of FY10 and FY11 data for IC Level 2

FY11, Questions by Type, IC Level 2

Questions by Type, IC Level 2

- Directional: 26%
- Reference: 46%
- IT/Mechanical: 8%
- Patron Accounts: 1%
- Services: 7%
- Other: 12%
Text-a-Librarian Statistics (staffed by WTC and LSC)

*Number of messages is down from 367 text message questions in year one.*

<table>
<thead>
<tr>
<th>Text-A-Librarian Statistics FY2011 (Administrative Data)</th>
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<tbody>
<tr>
<td>274 messages - many questions include multiple messages</td>
</tr>
<tr>
<td>235 questions</td>
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<tr>
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<tr>
<td>Directional</td>
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<td>Patron Accounts</td>
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<td>Other</td>
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AJCU AskLive Statistics (staffed by WTC and LSC)

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<tr>
<th>ASKLive Statistics FY 2010/2011</th>
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<tr>
<td>---------</td>
</tr>
<tr>
<td>Jul</td>
</tr>
<tr>
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</tr>
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</table>
LibStats Data, All Service Desks

Notes:
- Includes AskLive and Text Questions recorded in LibStats, though this data is incomplete for each service.
- Cudahy Circulation and IC One, Two, and Three stopped using LibStats early in FY11.

<table>
<thead>
<tr>
<th>Questions by Type and Location</th>
<th>Cudahy Circ</th>
<th>IC Ref</th>
<th>IC Consult</th>
<th>IC One</th>
<th>IC Two</th>
<th>IC Three</th>
<th>Librarians’ Office</th>
<th>Ref Rounds</th>
<th>Lewis Circ</th>
<th>Lewis Ref</th>
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<th>IC Two</th>
<th>IC Three</th>
<th>Librarians’ Office</th>
<th>Ref Rounds</th>
<th>Lewis Circ</th>
<th>Lewis Ref</th>
<th>WLA</th>
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<td>5549</td>
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<th>IC Consult</th>
<th>IC One</th>
<th>IC Two</th>
<th>IC Three</th>
<th>Librarians’ Office</th>
<th>Ref Rounds</th>
<th>Lewis Circ</th>
<th>Lewis Ref</th>
<th>WLA</th>
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<td>1299</td>
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<td>126</td>
<td>2468</td>
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<td>up to 60 minutes</td>
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<tr>
<td>over an hour</td>
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<td>254</td>
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<td>126</td>
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Reference Questions by Month and Question Type

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<th>Questions by Month and Question Type</th>
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<th>Prank Call</th>
<th>IT/Mechanical</th>
<th>Patron Accounts</th>
<th>Services</th>
<th>Other</th>
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Reference Questions by Time and Staffing

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<th>Reference Questions by Time and Staffing</th>
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<th>LSC Other Staff</th>
<th>WTC Reference Staff</th>
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<td>2491</td>
<td>188</td>
<td>2744</td>
<td>126</td>
<td>5549</td>
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</table>
Members of the Reference Department devoted significant time to preparing relevant, meaningful instruction to help ensure student success in their classes and to have a positive impact on information literacy at the university. In addition to course-related instruction, the librarians share responsibility for meeting with UCWR sections, as well as providing sessions for other general programs on campus such as the Summer Bridge Program.

Library support for UCWR 110:

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<thead>
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<th>Year</th>
<th>Number of UCWR Classes</th>
<th>Participants</th>
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<td>FY2010</td>
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<td>2301</td>
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<tr>
<td>FY2011</td>
<td>195</td>
<td>3078</td>
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LSC + WTC - total course related instruction, including UCWR:

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<th>Participants</th>
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<tr>
<td>FY2011</td>
<td>359</td>
<td>7042</td>
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LSC + WTC - all instructional activity, including UCWR:

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<th>Year</th>
<th>Course-related Instruction</th>
<th>Orientation</th>
<th>Research Appointment (RA)</th>
<th>Workshop</th>
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<td>26</td>
<td>381</td>
<td>45</td>
</tr>
<tr>
<td>FY 2010</td>
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<td>359</td>
<td>39</td>
<td>310</td>
<td>50</td>
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LSC only – all instructional activity, including UCWR:

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<th>Number of Class</th>
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<th>Preparation Time (hour)</th>
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<td>Workshop</td>
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<td>113</td>
<td>25.33</td>
<td>31.50</td>
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</table>
Reference Department Goals for FY11

1. Create one or more brief podcasts highlighting reference services for inclusion on the blog and on our Need Help? subject guide.

   *The Department did not accomplish this goal in FY2011.*

2. Complete the review of the reference collection. Begin discussions with the Associate Dean and other relevant library departments about how to proceed with recommendations to move many titles out of the reference collection to CMS or LSF.

   *The Department continued to make progress on weeding the reference collection in FY2011, but will need to continue work in FY12 before discussing next steps with the Associate Dean and other relevant library departments.*

3. Incorporate basic feedback and assessment tools into the majority of our library instruction and workshops.

   *The Department created a faculty feedback form and used this in the spring semester to solicit feedback from teaching faculty immediately following an instruction session.*

4. Work with Systems to revise online forms related to reference services.

   *All reference related service forms were revised in FY2011.*

5. Create an assessment tool for reference desk and/or research appointments and conduct a short-term assessment during a selected time period.

   *The Department created a reference services feedback form that can be used for our work at the reference desk as well as for research consultation appointment feedback. We used the form for one week in early April 2011 and reported on the responses.*

Reference Department Goals for FY12

1. Complete the review of the reference collection. Begin discussions with the Associate Dean and other relevant library departments about how to proceed with recommendations to move many titles from the reference collection to CMS or LSF.

2. Continue to look for opportunities to create and use meaningful assessment tools, possibilities include: incorporation of information and library knowledge questions in the freshman survey; creation of a UCWR pre/post test for inclusion in UCWR Blackboard courses; and the creation/use of a feedback form for all library programming.
3. Continue experimenting with mobile technologies and the “Reference Rounds” model to provide reference services in both the IC and Cudahy Library.

4. Create new ways to market reference and library help services throughout our library facilities through signage, computer kiosks, and QR codes.

5. Continue to develop asynchronous learning content that supports undergraduate use of the libraries as well as the development of information literacy skills.

Staffing

The Reference Department is pleased to report no staffing changes in FY11. Jamie added English-as-a-Second Language (ESL)/International Students Office to his liaison responsibilities and Jane added Women’s Studies & Gender Studies and Honors Program liaison to her areas of responsibility.

Personnel:

- Jeannette Pierce, Head of Reference Services, Subject Specialist for History, Asian Studies and Medieval Studies
- Eileen Black, Government Documents Assistant (part-time)
- Jane Currie, Subject Specialist for Theology, Philosophy, Islamic World Studies, Classical Studies, and Women Studies & Gender Studies, and Liaison to the Honors Program
- James MacDonald, Government Documents Librarian, Subject Specialist for Sociology, Political Science, International Relations, Peace Studies, and liaison to ESL/International Students Office
- Stephen Macksey, Subject Specialist for Black World Studies, Chemistry, Physics, and Psychology
- Niamh McGuigan, Subject Specialist for English, Latin American Studies, and Modern Languages & Literatures
- Brenda Overton, Reference Assistant
- Tara Radniecki, Electronic Resources Librarian/Subject Specialist for Biology, Natural Sciences, and Nursing
Appendix A

Loyola University Chicago: Government Publications Annual Report

During fiscal 2010/2011 the primary goal of the Government documents department was to ensure that the Loyola University Libraries Government Documents collection best fits the needs of our user community. Our three areas of focus have been: [Note: numbering in the following three items is off. It currently lists the points as 4, 5, and 6 rather than 1-3.]

1. Reducing our existing print FDLP collection and expanding our electronic access to government information.
2. Increasing the visibility and accessibility of government publications.
3. Developing a professional network to learn from other depositories.

1. Down sized the Collection

Reduced Current subscriptions:
- Significantly reduced the number of physical items we subscribe to based on input from Subject Specialists.

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<th>July-11</th>
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</tr>
<tr>
<td>CD ROM</td>
<td>52</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Electronic Items</td>
<td>562</td>
<td>861</td>
<td>951</td>
</tr>
<tr>
<td><strong>Total selected items</strong></td>
<td>2112</td>
<td>1121</td>
<td>991</td>
</tr>
<tr>
<td>Items available</td>
<td>8308</td>
<td>8745</td>
<td>8938</td>
</tr>
<tr>
<td><strong>Total items selected</strong></td>
<td>34.5%</td>
<td>12.80%</td>
<td>11.1%</td>
</tr>
</tbody>
</table>

Reduced Physical Inventory:
- Weeded approx. 1500 pieces ephemera and duplicated or superseded materials.
- Eliminated 36 shelf file boxes of ephemera which included outdated maps, brochures and pamphlets, etc.

2. Increased the visibility and accessibility of Government Publications

- Revised the Government document subject guide and added links to all Federal Depository Essential Titles. Providing electronic access to this titles increases patron access and eliminates the need for us keep a print copy.
- Highlighted Government electronic resources during spring programming session that focused on: “U.S. Government Information @ Your Desktop.”

3. Explored was to improve our Government Document Department

- Actively participated in NIDL (Northeastern Illinois Documents Librarians) organization/
- Promoted information sharing between Illinois depository libraries by hosting the NIDL wiki on our server.
- Visited FDLP collections at the University of Chicago, Dominican University, and Chicago Public Library’s Harold Washington branch.
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 FY2011. Two departments make up the Division: Monograph Acquisitions & Cataloging (MAC) led by Ling-li Chang and Serials & Electronic Resources Management (SERM) guided by Martha Spring. Both departments had an outstanding year, accomplishing a significant number of planned goals and new library-wide service projects initiating from growing user expectations. 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 rapid technological developments. As the library continues to move from ownership-based to access-based models, the technical services division will face the challenge of providing access to new types of resources while still acquiring and processing materials in more traditional formats. Staff formerly focused on print are now being trained to also support e-resources. Some reorganization was initiated to make the operations and duties more rational, workloads more equitable and backup possible. The division continues to adapt staff responsibilities to integrate e-resources into the division’s workflow and accommodate the demands of acquiring, processing, and maintaining access to electronic resources while continuing to support print.

Technical Services staff partnered and collaborated across departments, division lines and campuses to strengthen services, support projects, and to improve access to and awareness of the library’s many products, collections and initiatives. SERM staff collaborated with Loyola’s Health Sciences Library staff to provide cross-campus journal access. Serials and monographic cataloging staff worked with Lewis and Cudahy public services to relocate and/or withdraw materials from the libraries and to resolve identified problems. MAC staff partnered with the Rome Center Library to provide technical support in planning the inventory/weeding project.

I am thankful for the exceptional team of librarians and staff that the division has assembled and for the amount and quality of work they have accomplished in FY2011. During the past year the division has demonstrated great flexibility and openness to change by assuming new responsibilities, adjusting to re-assignments of duties, adopting new procedures/approaches to ensure that all core functions and new initiatives were performed in a timely manner.

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 filling two vacant positions, training promoted and new staff members, and planning and implementing two new library wide services. As part of the recruiting process, the job responsibilities of the vacant positions were reviewed and revised. Staff also filled in for vacant positions to cover urgent and essential work. In FY 2011 the department implemented the library’s very successful patron-driven e-book acquisitions service and established the Cudahy English as a Second Language (ESL) book collection. The Monograph Department provided guidance and direction for the Rome Center Library inventory/weeding project, and completed a second phase of the collection enhancement purchase project.
To initiate the e-book project, the monographic acquisitions unit coordinated with the EBL staff to establish patron-driven parameters, gather usage analysis data and administer MARC record updates. In addition to the EBL project, the department engaged in assignments throughout the year that increased the presence of e-books in Pegasus, the library’s online catalog; provided easy discovery for ESL book collection; and enhanced the libraries’ print collection by addressing weaknesses identified in the collection analysis process. To support the move of the Rome Center Library, the monograph cataloging unit played a key role in planning and executing that library’s inventory/weeding project. Voyager reports were created and analyzed; project options were introduced, reviewed, and recommended. Location changes were made and problems were resolved.

In addition to the major accomplishments highlighted above, the department established a video cataloging contract, streamlined cataloging procedures to improve access, set up new Voyager locations, and participated in Cudahy’s inventory project. Monograph cataloging staff were consulted and served as a resource for the Beijing Center Library, Catholic Research Alliance Portal, and the Women and Leadership Archives book collection. Many of these projects and assignments required research, constant policy/procedure review, operation modification and staff training.

The Monograph Acquisitions and Cataloging Department also maintained high quality work and efficiency in handling book order requests, receiving new books and DVDs, cataloging all new print and electronic titles and maintained accurate records of what the libraries own. Staff continued to plan for, monitor, and report on collection budget distribution and spending status.

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

The Serials and Electronic Resources Management Department had a very successful year with numerous challenges and achievements. Position vacancies allowed for a review of staffing needs, processes and procedures resulting in development of new work flows and improved operations. The Department continued transitioning serials collections from print to online for many of its holdings this year, acquiring new electronic resources while maintaining and continuing support of print and electronic serials collections. Several major electronic resources purchases were processed and a substantial review and maintenance of e-journal coverage was accomplished. Licenses for new e-resources were negotiated to provide the broadest services to Loyola users. Acquisition of electronic resources continues to be characterized by complex subscriptions arrangements, which can include partnerships with other libraries, packages involving multiple titles, fluctuating pricing models, and license clauses prohibiting cancellations of either print or online titles within the time period of the signed license. The yearly renewal period of serial subscriptions has developed into a time of frantic consultation with other library colleagues and vendor representatives all under a very tight timeframe.

In addition to adding new journals and updating problem titles upon notification from users and staff, serials acquisition staff successfully reviewed over 800 journal titles on over 40 platforms to confirm access, report problems, and update e-journal list information as needed. The JSTOR Current Scholarship Collection was a specifically complex e-resource to process, with the transition of multiple journals from print to online from different platforms and/or publishers. Wiley completely renovated their platform in mid-2010 resulting in another multifaceted and involved transition. The serials/e-resources team effectively corrected Wiley’s access issues related to faulty re-directs and non-functioning article linkers. The new Sage Premier 2011 package resulted in over seventy additional journals along with the opportunity to cancel individual subscriptions.
Serials cataloging staff successfully completed cataloging a large digitized journal collection (JSTOR V and VI) and collaborated with Access Services staff to relocate approximately 2000 volumes. Withdrawals were processed for government documents and location changes continued at Lewis and Cudahy Libraries.

Plans were made to have the Preservation Associate oversee students scanning for the digitization project. A publisher’s agreement document was drafted and will be added to the electronic submission process already in place through ProQuest.

In addition to the activities listed above, the Serials and Electronic Resources Department continue 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 2011-2012**

**Monograph Acquisitions & Cataloging Department**

1. Complete the training programs for Acquisitions Associate and for Rapid Cataloging/Catalog Maintenance Assistant. (summer-winter)
2. Work with library collection development groups to create collection policies and guidelines for e-books and to implement Serials Solutions E-Book module. (summer-fall)
3. Refine department procedures for e-book ordering, receiving and cataloging. (summer-fall)
4. Establish cataloging procedures for Loyola faculty authored books and complete cataloging the books participated in the 2010 Faculty Scholarship Celebration event. (summer)
5. Provide bibliographic access, in Pegasus and WorldCat, for the archival print copies and the electronic copies of Loyola theses and dissertations. (fall-spring)
6. Execute a retrospective cataloging project for Women and Leadership Archives monograph collection. (winter-summer)
7. Complete a cataloging and reclassification project for a group of selected government documents. Incorporate government documents into department cataloging workflow. (fall)
8. Help the Rome Center Librarian to complete the Rome Library Inventory and Weeding Project. (fall)
9. Complete catalog maintenance requests from the Cudahy Inventory Pilot project. Incorporate those tasks into department catalog maintenance workflow as ongoing collection inventories are conducted. (summer-fall)
10. Help the Beijing Center Library to implement a cataloging and reclassification project for their regular book collection. Provide training and guidance as needed throughout the project. (summer-spring)
11. Prepare for Windows 7 migration and Macro Express software upgrade. (fall-winter)
12. Plan for and execute OCLC Connexion software upgrade. (fall)
13. Plan for and execute Voyager release upgrade. (fall-winter)

**Serials & Electronic Resources Management Department**

1. Digitization Projects: Create a new scanning station for the digitizing project inside the bindery office. Supervision of student workers who are scanning Loyola materials (starting with theses and dissertations) for the Library repository has been transferred to Preservation Associate, Sandra Hernandez. Evaluate work flows and recommend work flow changes as needed. (summer-ongoing)
2. Complete major government documents withdrawal project of large serial sets totaling over 800 volumes (fall)

3. Department statistics: Update individual work forms to include work done on e-resource maintenance (i.e. journal coverage checks in Serials Solutions). Complete training for reporting and compiling department statistics. (summer)

4. Post, interview, hire and train Serials Cataloger for position vacated effective August 1, 2011. (fall)

5. Serials Solutions E-Books module: Work with Monograph Acquisitions and Cataloging to implement and discuss ongoing maintenance for this new module. (fall)

6. “Under Galvin” project: Update Voyager and OCLC for volumes officially withdrawn from “under Galvin”. Currently these records are suppressed in Pegasus, but are still in Voyager. (fall)

7. Catalog JSTOR 8 collection, acquired July 2011 (fall)

8. Discuss and refine work flows for periodicals, especially electronic journals: expand to include maintenance of existing subscriptions (title changes, cessations, cancellations, etc.) as well as new title work flows. (fall - ongoing)

9. Plan for Cudahy bound journal volumes to be withdrawn or transferred to storage by summer 2012. (summer-ongoing)

10. Compile remaining W-8 and W-9 forms from serials vendors (winter)

11. Continue with progression of the ETD project; including new workflow and procedures for scanning thousands of dissertations and theses from Archives to prepare for the upcoming Digital Repository. (fall - ongoing)

12. Significantly decrease backlog of items requiring in-house repair or phase boxes (spring)

13. Complete Health Sciences (LUHS) Print Journal Discards to Cudahy Project. (Timing is dependent on withdrawal process at LUHS)
The Monograph Acquisitions and Cataloging Department successfully completed another year filled with new initiatives and accomplishments. Among the many highlights were filling vacant positions, training promoted and newly hired staff members, implementing the library’s first patron-driven ebook acquisitions service, and improving workflow and procedures.

**Accomplishments:**

**Staff Hiring and Training**

The department was one staff member short for seven months from October 2010 to April 2011. We completed two recruit processes: first promoted Kim Medema to Monograph Acquisitions Associate and then hired Kelsey Williams to fill Kim’s former job, Catalog Maintenance/Rapid Cataloging Assistant. Training for Kim and Kelsey started on January 18th and April 25th, 2011 respectively. As part of the recruit process, we revised job responsibilities of the vacant positions and filled in for vacant positions to cover urgent and essential work.

**New Library-Wide Services**

- **EBL EBook Patron-Driven Pilot.** Played a major role in planning and implementing the EBL ebook patron-driven acquisitions service between summer 2010 and spring 2011. Coordinated with the project working group and EBL staff, set up patron-driven parameters, gathered usage and cost analysis data and managed MARC record updates. Developed acquisitions and cataloging procedures for EBL titles and MARC records.

- **Cudahy ESL Collection.** Participated in planning and implementing the new English as a Second Language book collection. Established acquisitions and cataloging procedures. Purchased and cataloged 71 books to kick off the collection in winter 2010/2011. Created a special cataloging treatment for the ESL books to allow easy discovery of them on shelf and in Pegasus. The treatment also provided clear division between the adapted ESL version and the full version of the literary work.

**Acquisitions and Collection Budget Management**

- Remained current with ordering book selections, receiving newly acquired books and processing payment invoices and procurement card transactions. Continued to help plan for collection budget distribution and spending. Remained current on monitoring and reporting collection budget status throughout the year.

- **Faculty Authored Books.** Refined the acquisitions procedures for Loyola faculty authored books. Expeditiously acquired 73 in-print and out-of-print books in time for inclusion in the Faculty Scholarship Celebration event held in October 2010.

- **Workflow and Procedure Improvement.** Further streamlined the workflow for book and AV purchases made by procurement cards in fall 2010. Transferred from Acquisitions Associate to individual procard owners the responsibilities of reviewing procard transactions and creating Voyager invoices. Discontinued making backup copy of Voyager vouchers and procard receipts. Worked with Access Services and transferred the responsibility of receiving new AV items to the AV Coordinator.
• **Collection Enhancement Purchase Project.** Completed the second year purchase project for books identified through the Bowker book analysis project in spring 2011. Four Bowker lists of titles in dance, music, Polish language and literature and Spanish literature were processed. A total of 488 titles were ordered and 379 books were received. Evaluated and used vendor Midwest Library Service for this purchase project so that acquisitions and cataloging records could be batch loaded into Voyager.

• **Vendor W-9 and W-8 Form.** Coordinated with the Serials Department and the University accounting offices, made sure a new and correct W-9 or W-8 form was submitted to Accounts Payable along with the first check request for each vendor since March 2011.

• **Fiscal Year Close Plans.** Took extra steps in May and June 2011 to meet the year-end spending target for collections. Processed 700 more book selections than the same time last year. Monitored the fund status meticulously invoice by invoice and adjusted spending plans as needed through end of June.

**Cataloging and Bibliographic Access**

• Remained current with cataloging of all newly acquired print and electronic titles.

• **OCLC Video Cataloging Contract.** Established a new contract for video cataloging work by OCLC between fall 2010 and spring 2011. Evaluated the different pricing models and service options. Assessed our needs and decided on contract details. Carefully reviewed the initial batches of records supplied under the new contract.

• **E-Book Presence in Pegasus.** Besides EBL records mentioned above, batch loaded 59,975 records into Pegasus during the year. They included 51,091 records for materials in the Gale Digital collections, 266 records for the Cambridge Histories Online collection and new records for the Humanities E-Book Collection and the Springer Behavioral Science Collection.

• **Workflow and Procedure Improvement.** Since summer 2010, batch removed unwanted MARC fields from OCLC supplied records using MARCEdit software to save cataloging staff time. Incorporated downloading of name authority records into copy cataloging procedures in spring 2011 to improve searching and discovery in Pegasus for new books.

**Online Catalog and Physical Item Maintenance**

• Remained current with routine maintenance requests for withdrawal, relocation, correction and reclassification, etc. from all departments and all libraries. Remained current with loading Library of Congress subject heading updates.

• **Lewis Duplicates Weeding Project.** Two staff members periodically traveled to Lewis Library to withdraw weeded duplicates in summer 2010. A total of 231 titles and their 1,508 volumes were withdrawn by this project.

• **Rome Library Inventory and Weeding.** Helped the Rome Center Librarian to plan for and execute inventory and weeding of the Rome Library materials between fall 2010 and summer 2011. Created Voyager reports to help analyze and weed the Rome book collection. Recommended project options and detailed procedures. Withdrew 937 titles and their 2,106 volumes via batch jobs and manually. Resolved numerous lists of problems including volumes without item barcodes. Batch updated Voyager records to an interim location to facilitate the item-by-item scanning projects.

• **Weeded Dewey Sets Cleanup.** In summer 2010 completed a cleanup project for the already weeded Dewey sets. Created Voyager reports to identify the scattered volumes in those sets and withdrew 247 such volumes.
• **Cudahy Deck C Reconfiguration.** Helped inventory the books held in Cudahy Deck C and reconfigure the Deck C space since July 2010. Created Voyager reports to identify items associated to Cudahy Deck C and Oversize locations. Set up a new Voyager location for folio sized books. Batch updated 1,457 Voyager records for the Dewey books moved from Cudahy Deck C to Library Storage Facility. Resolved problems as they surfaced throughout the project.

• **Cudahy Inventory Pilot.** Participated in the Cudahy Inventory Pilot advisory group to help plan for the project in spring 2011. Withdrew the items weeded by subject specialists and resolved problems in a timely manner to help test and refine the inventory process.

• **Voyager Records for Former Science Library.** Executed batch change jobs throughout the year and updated 32,400 former Science Library records.

**Other Projects**

• **Beijing Center Library Cataloging Project.** Investigated options and helped plan for a cataloging project for the Beijing Center Library book collection since November 2010. Developed the cataloging project plans and time frame. Set up OCLC membership for the Beijing Center.

• **New Books for WLA and UA.** Set up Voyager book funds and locations and began purchasing books for Women & Leadership Archives and University Archives in fall 2010. Established acquisitions and cataloging procedures for these special collection purchases.

• **CRRA Portal.** In winter 2010/2011, coordinated with the Archives managers and Head of Library Systems and completed the first extraction of Voyager records for inclusion in the Catholic Research Resources Alliance Portal.

• **Health Sciences Library Deselected Books.** Coordinated the process of reviewing the deselected Health Sciences books. A total of 21 de-selection lists were distributed to subject specialists to review in summer and fall 2010. 190 books were obtained from HSL and added to Cudahy, Lewis and LSF collections.

❖ **Staff Changes**

**NEW STAFF**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kelsey Williams</td>
<td>Catalog Maintenance and Rapid Cataloging Assistant</td>
<td>4/25/2011</td>
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**PROMOTION**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kimberly Medema</td>
<td>Monograph Acquisitions Associate (Promoted from Catalog Maintenance and Rapid Cataloging Assistant)</td>
<td>1/18/2011</td>
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**RESIGNATION**

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Molly Mansfield</td>
<td>Monograph Acquisitions Associate</td>
<td>9/30/2010</td>
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Key Statistics for FY 2011

<table>
<thead>
<tr>
<th></th>
<th>FY11</th>
<th>FY10</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Books</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Print Book Titles Ordered</td>
<td>9,065</td>
<td>9,061</td>
<td>0%</td>
</tr>
<tr>
<td>a) Orders for Purchase On Demand Program</td>
<td>491</td>
<td>383</td>
<td>28%</td>
</tr>
<tr>
<td>b) Orders for Replacement Copies</td>
<td>181</td>
<td>77</td>
<td>135%</td>
</tr>
<tr>
<td>c) All Other Orders</td>
<td>8,393</td>
<td>8,601</td>
<td>-2%</td>
</tr>
<tr>
<td>Print Book Volumes Received</td>
<td>13,021</td>
<td>11,700</td>
<td>11%</td>
</tr>
<tr>
<td>Print Book Titles Cataloged¹</td>
<td>12,034</td>
<td>14,648</td>
<td>-18%</td>
</tr>
<tr>
<td>Print Book Volumes Cataloged¹</td>
<td>12,743</td>
<td>15,423</td>
<td>-17%</td>
</tr>
<tr>
<td>Print Book Titles Withdrawn²</td>
<td>2,173</td>
<td>1,868</td>
<td>16%</td>
</tr>
<tr>
<td>Print Book Volumes Withdrawn²</td>
<td>5,257</td>
<td>3,447</td>
<td>53%</td>
</tr>
<tr>
<td><strong>E-Books</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-Book Titles Ordered/Access Activated²</td>
<td>282</td>
<td>26</td>
<td>985%</td>
</tr>
<tr>
<td>Total E-Book Titles Accessible as of July 1, 2011⁴</td>
<td>351,510</td>
<td>251,304</td>
<td>40%</td>
</tr>
<tr>
<td>E-Book Titles Cataloged Individually³</td>
<td>252</td>
<td>26</td>
<td>869%</td>
</tr>
<tr>
<td>E-Book Titles Cataloged via Batch Load Projects⁴</td>
<td>101,901</td>
<td>231,593</td>
<td>-56%</td>
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<td><strong>Books on Microform</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Microform Titles Cataloged</td>
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<td>#DIV/0!</td>
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<tr>
<td>Microform Units Cataloged</td>
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<td>#DIV/0!</td>
</tr>
<tr>
<td><strong>A-V Materials</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AV Items Received</td>
<td>318</td>
<td>293</td>
<td>9%</td>
</tr>
<tr>
<td>AV Titles Cataloged (by OCLC Contract Cataloging)⁵</td>
<td>237</td>
<td>398</td>
<td>-40%</td>
</tr>
<tr>
<td>AV Units Cataloged (by OCLC Contract Cataloging)⁵</td>
<td>237</td>
<td>402</td>
<td>-41%</td>
</tr>
<tr>
<td><strong>Catalog Database Maintenance</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Item Relocations, Reinstates, Corrections, Reclasses, etc.</td>
<td>1,089</td>
<td>1,006</td>
<td>8%</td>
</tr>
<tr>
<td>Catalog Maintenance via Batch Change Projects⁶</td>
<td>35,393</td>
<td>16,992</td>
<td>108%</td>
</tr>
<tr>
<td>Name, Series and Subject Heading Authority Work</td>
<td>13,019</td>
<td>17,887</td>
<td>-27%</td>
</tr>
</tbody>
</table>

Notes:
1. FY11 statistics for print titles and volumes cataloged were lower than in FY10 mainly because (a) there was a contract cataloging project for 756 foreign language titles in FY10, and (b) a vacancy in cataloging and training for the new hire.
2. FY11 statistics for print titles and volumes withdrawn include 231 titles their 1,508 volumes weeded from Lewis Weeding Project and 937 titles and their 2,106 volumes weeded from the Rome Library Move and Weeding Project.
3. FY11 statistics for individual e-book titles ordered/activated and cataloged show a significant increase mainly because of EBL titles automatically purchased by patrons.
5. FY11 statistics for AV items cataloged show a significant decrease because of a 4-month long new contract establishment process.
6. FY11 statistics for catalog maintenance work done via batch change projects include change of 32,400 records for former Science books and periodicals.
FY 2011 Department Goals Status:


2. Refine and document the acquisitions procedures for Loyola faculty authored books participated in the annual Faculty Scholarship Celebration events. Establish cataloging procedures for Loyola faculty authored books and begin to catalog those held in the University Archives Collection. (summer-fall) *Completed the acquisitions aspect of the goal. See Acquisitions and Collection Budget Management, page 1. Deferred cataloging aspect to FY 2012. See FY 2012 Department Goals, item 4, page 6.*

3. Establish and document acquisitions and cataloging procedures for newly purchased monographs for the Women & Leadership Archives and the University Archives monographs collections. (summer-spring) *Completed. See Other Projects, page 3.*

4. Provide bibliographic access to archival print copies and electronic copies of Loyola theses and dissertations in Pegasus and WorldCat databases. (summer-spring) *Deferred to FY 2012. See FY 2012 Department Goals, item 5, page 6.*

5. Keep Loyola holdings in sync in Voyager and WorldCat databases by working with Library Systems to implement routine batch jobs. (fall-spring) *Deferred indefinitely because there was not a pressing need to set up a routine batch process.*

6. Increase the presence of e-books and streaming videos in the Pegasus catalog by working with Library Systems to implement routine batch job workflow for one-time and ongoing e-book and streaming video collections. (fall-spring) *Increased the presence of e-books in Pegasus through ad hoc projects. See Cataloging and Bibliographic Access, page 2. Routine workflow investigation was deferred indefinitely.*

7. Plan and complete projects to clean up problems with misrepresented Loyola holdings in WorldCat Local. (fall-spring) *Not completed. Will resolve small groups of problems on an ongoing basis as staff time allows during FY 2012 and beyond.*

8. Process withdrawals for weeded Lewis duplicate copies as they are removed from Lewis stacks. (summer-spring) *Completed as a project. See Online Catalog and Physical Item Maintenance, page 2. Will continue to process requests as they are received.*

9. Process relocations and withdrawals for Cudahy Reference materials as recommended by the Subject Specialists. (fall-spring) *Incorporated the requests into department catalog maintenance workflow due to infrequent and small amount of requests.*


11. Coordinate review of Health Sciences Library books that are being weeded by HSL. Add weeded HSL books into University Libraries’ collection as recommended by the Subject Specialists. (summer-winter) *Completed. See Other Projects, page 3.*

12. Improve accuracy of holdings information in the Pegasus catalog by cleaning up the records related to the 2004 Dewey Books Weeding Project and by resolving problems of the LSF books circulated to patrons and returned. (summer-spring) *Completed. See Online Catalog and Physical Item Maintenance, page 2.*

13. Re-establish the video cataloging contract with OCLC Metadata Contract Services under OCLC’s new pricing model. Evaluate outcome of the new contract and make adjustments as needed. (summer-winter) *Completed. See Cataloging and Bibliographic Access, page 2.*
FY 2012 Department Goals

1. Complete the training programs for Acquisitions Associate and for Rapid Cataloging/Catalog Maintenance Assistant. (summer-winter)
2. Work with library collection development groups to create collection policies and guidelines for e-books and to implement Serials Solution E-Book module. (summer-fall)
3. Refine department procedures for e-book ordering, receiving and cataloging. (summer-fall)
4. Establish cataloging procedures for Loyola faculty authored books and complete cataloging the books participated in the 2010 Faculty Scholarship Celebration event. (summer)
5. Provide bibliographic access, in Pegasus and WorldCat, for the archival print copies and the electronic copies of Loyola theses and dissertations. (fall-spring)
6. Execute a retrospective cataloging project for Women and Leadership Archives monograph collection. (winter-summer)
7. Complete a cataloging and reclassification project for a group of selected government documents. Incorporate government documents into department cataloging workflow. (fall)
8. Help the Rome Center Librarian to complete the Rome Library Inventory and Weeding Project. (fall)
9. Complete catalog maintenance requests from the Cudahy Inventory Pilot project. Incorporate those tasks into department catalog maintenance workflow as ongoing collection inventories are conducted. (summer-fall)
10. Help the Beijing Center Library to implement a cataloging and reclassification project for their regular book collection. Provide training and guidance as needed throughout the project. (summer-spring)
11. Prepare for Windows 7 migration and Macro Express software upgrade. (fall-winter)
12. Plan for and execute OCLC Connexion software upgrade. (fall)
13. Plan for and execute Voyager release upgrade. (fall-winter)
Highlights:

The SERM department continued transitioning serials collections from print to online for many of its holdings this year, acquiring new electronic resources while maintaining and continuing its support of print and electronic serials collections. Along with this transitioning came the evaluation and reorganizing of work flows for several staff members and for department work flows.

Two positions in the department were vacant for a total of eleven months. Although Odile May, Serials Acquisitions Assistant, retired in January 2010, her position remained vacant into this fiscal year for a total of eight months, due to a university hiring freeze. Christa Kileff, Bindery Associate, resigned in September 2010 and her position was vacant for three months. While challenging, this shortage of staff also gave us the opportunity to re-examine SERM positions and modify procedures to improve work flows.

SERM carried on the usual work of ordering, receiving, paying, claiming, tracking, providing access to and trouble-shooting the Libraries’ serials and electronic resources. The department also contributed to on several major projects throughout year. With funds available at the end of the fiscal year, we were able to spend money originally set aside for subscription pre-payments. Major projects for the year included several weeding and relocation projects and a substantial review and maintenance of e-journal coverage. The Electronic Theses and Dissertation program continued its successful implementation process and additional digitization projects were taken on by the bindery unit.

Accomplishments for the year are listed below. Those involving more than on unit are listed under department-wide, and projects mainly handled by one unit are listed under that unit. Electronic resources usually involve more than one area and are listed separately as well.

Activities:

Department-Wide:

- Discussed and revised documented work flows for new electronic journals acquired by the libraries. Evaluated changes made since last fiscal year and discussed next steps, for maintenance of existing print and e-journal subscriptions.
- Created lists for new journal collections, and updated existing journal lists for potential withdrawal or transfer to storage: JSTOR collections not yet moved (5, 6, 7, 8), Sage Back Files (Cudahy); Sage Premier (current collections), and Oxford Journal Archives (Humanities and Social Sciences) collections ordered in June 2011.
- Sherri Saltzman, Serials and Electronic Resources Librarian/Bibliographer for Anthropology, continued with her Subject Specialist duties, including the ordering of materials for Anthropology, instruction and reference by appointment. She also requested materials from professors for the faculty scholarship program and
attended Collection Management Committee meetings through the year. Finally, she reviewed anthropology reference materials as part of the Cudahy Reference weeding project.

**Personnel:**
- Rewrote job description and justification for the Bindery Associate position in September and job reconfigured as Preservation Associate.

**Electronic Resources: General:**
- Heather Cannon resigned from LUHS last July 2010 and Jean Gudenas replaced her as Head of Collection Services in August. Martha Spring worked with Jean to orient her on cross-campus issues and activities, especially acquisitions activities with subscriptions shared by the campuses.
- Bioscience Journals: Loyola’s Health Sciences Library cancelled many journal subscriptions in 2010. SERM compiled a list of which journals titles were not available online at the main campus, including the cost to pick up a subscription. Bioscience faculty prioritized the titles and Bob Seal, Dean of University Libraries, approved subscriptions for the top five titles. We paid extra for cross-campus access when feasible (all but one of the new titles).
- Value Assessment: Sherri and Martha compiled, organized and summarized data for 2010 database statistics and compared the data to the previous year’s findings. The ERPC will discuss the data and trends and make decisions on which databases will be on probation for potential cancellation in the next year.
- Negotiated fourteen licenses for new databases.

**Electronic Resources: Publisher and Format Changes:**
- JSTOR Current Scholarship Collection: 49 titles from 17 publishers, with access via the JSTOR platform starting 2011. The Current titles were previously print subscriptions or were available online via different journal platforms/publishers.
- Standing orders transferred from print to online: Advertising Red Books, Ward’s Business Directory;
- Transitioned journals from print or print + online to electronic: Cambridge University Press, Walter DeGruyter, miscellaneous other titles.
- Mergent: Met with Paul Hazlett, Mergent Service & Sales Director, to discuss and plan the transition of several print subscriptions to Mergent Web Reports (expected July 2011);
- Library added subscriptions for several Cabell’s online directories: Computer Science, Health Administration, and Nursing

**Electronic Resources: New resources:**
- Worked with Taya Franklin, Reference Librarian/Bibliographer for Business and Communication and Ling-ili Chang, Head of Monograph Acquisitions and Cataloging, to set up purchases of new databases paid from new Terry Communications Endowment fund (comScore Media Matrix and Passport GMID)
- Ordered, acquired, verified access and cataloged one-time purchases including Times Digital Archive, TLS Digital Archive, Wilson retrospective indexes (Art, Business, Education, etc.), Oxford Journal Archives, Humanities and Social Sciences collections.
• Ordered, acquired, verified access and cataloged subscriptions for new databases including: Oxford Bibliographies Online, Oxford Language Dictionaries, Education Research Complete and Standard & Poor's Net Advantage.
• Ordered, acquired, verified access and cataloged 25 new e-journal subscriptions, including faculty-requested Biochemistry and Cell Biology, Genome Research, Journal of Sponsorship and Du Bois Review: Social Science Research on Race

Electronic Resources Access:
• E-Journal Coverage Checks: In addition to adding new journals and updating problem titles upon notification from patrons and staff, Ray Clark, Serials Acquisitions Assistant, reviewed over 800 journal tiles on over 40 platforms to confirm access, reporting problems and updating e-journal list information as needed.
• Wiley Online Library: Wiley did a complete overhaul of its platform in mid-2010, which resulted in several months of access issues related to faulty re-directs and non-functioning article linkers. We worked on these issues over the course of several months.
• Environment Abstracts: Lost access temporarily due to new publisher and lost record of our payment by vendor.
• Several e-reserves persistent links examined and resolved by Sherri Saltzman in the fall 2010 semester.
• JSTOR Current: Several issues with access of titles transferred to JSTOR current monitored and resolved between late 2010 and early 2011.

Serials Acquisitions:
• Sage Premier 2011: A new license was negotiated and included 71 additional titles from the Sage package last negotiated in 2008. With these new journals included in the package, we cancelled about 20 individual subscriptions that are now part of Sage Premier 2011. Verified access to new titles, and calculated that the package’s cost increase was not as great as originally anticipated.
• Newspapers: Worked with Access Services department and Fred Barnhart, Associate Dean for Library Services and Collections, to review and revise location and retention policies for newspapers, which were moved from the Stack Deck B to the Current Periodicals area. Also transferred the three popular reading magazines originally located in the IC to the Current Periodicals are. Retention for print newspapers was shortened when possible due to online availability, reducing clutter on the shelves.
• Several standing orders are now treated as “Hold & Notify” per request from Jane Currie, Reference Librarian/Bibliographer for Classical Studies, Islamic Studies, Philosophy, Women's Studies and Theology, so that interested faculty are notified as volumes are received at the library.
• Started requesting and compiling updated W-8 and W-9 forms from serials vendors per Loyola Accounts Payable requirement. As of late June, approximately one-third of approximately 300 vendor forms were acquired.
• Rome Subscriptions: Worked with Elise Aversa, Rome Center Librarian, to confirm receipt of and review Rome subscriptions; cancelled two subscriptions as a result.
• Continued to monitor Price Increase Alerts from EBSCO, requesting recommendations from subject specialists on whether to retain or cancel subscriptions with dramatic price increases.
• Kate Dunn, Serials Acquisitions Assistant, worked with Jimmy Thomas, Stacks Supervisor, to resolve problems with current periodicals journals as he reorganized that area (100+ titles).

Serials Cataloging:
• JSTOR V and VI collection cataloging completed, 240 titles (September 2010)
• Reference Weeding: Project from last year continued at Cudahy; also withdrew several print sets upon purchase of online retrospective indexes including Wilson Art Index and Social Sciences & Humanities Index.
• Worked with Jimmy Thomas to relocate approximately 2000 volumes from Stack Deck C to the Library Storage Facility and Cudahy main stacks.
• Lewis Weeding continued from last year, as Lewis Library lost a large amount of space.
• IC Reference location items were changed to Cudahy Reference
• Government Documents Withdrawals: Began project to withdraw 900 volumes before the end of summer 2011.

Bindery/Preservation:
• Sherri Saltzman managed the Bindery and supervised the student workers though most of the fall 2010 semester.
• Sandra Hernandez, new Preservation Associate, began managing bindery operations in late November 2010. In addition to the usual process of preparing, receiving and processing periodical and book bindery shipments every other week, Sandra also managed the complex dissertation/thesis binding and oversaw the annual Rome Cargo Shipment.
• Electronic Theses and Dissertations (ETD) / Digitization Project: Since May 2010 all of the graduate schools have successfully implemented the electronic submission of theses and dissertations process. Now the Electronic Thesis Dissertation plan for Loyola has entered a new phase by implementing a digitizing project managed by Sandra Hernandez. The goal of the digitizing project is to scan all the archive copies of dissertations and theses that are not currently accessible online. These scanned documents will be an integral part of Loyola’s new digital repository.
• Sherri Saltzman, in her role as a member of the Digital Repository Implementation Team (DRIT), drafted a publisher’s agreement document to legally formalize permission from graduate students to house their research on Loyola’s upcoming digital repository. This document will be added into the electronic submission process already in place through ProQuest. The publisher’s agreement should be added to the electronic submission process before the start of the fall semester 2011.
• The Bindery Unit also supported and managed the complex dissertation/thesis binding, distribution and resolved issues surrounding users’ requests and school/colleges’ requirements.

FY2011 Departmental Goal Status Report:
• Post, interview, hire and train Serials Acquisitions Assistant for position vacant since February 2010. (Fall 2010) Completed: Ray Clark hired with start date September 27, 2010.
• Standing Order Cancellation Project Follow-Up (Ongoing; February 2011): Completed.
• Catalog new JSTOR collections (V & VI Arts and Sciences) (Completed: September 2010)
• World Cat Local record clean-up: Finish cleanup of Voyager problem serial records from lists run by Ling-li Chang, Head of Monographs Acquisitions and Cataloging, in early 2010. (Fall 2010): Completed, Spring 2011.
• Electronic Journal Cataloging Workflows: Follow up on new procedures to discuss and implement possible improvements (by Winter 2011): Completed: several meeting between September 2010 and February 2011; ongoing evaluation and refinement expected for 2012, including maintenance on existing e-journals subscriptions.
• Work with Access Services to clean up CPER and resolve subscription status inconsistencies (Summer/Fall 2010): Completed early 2011.
• Continue working on weeding/relocation projects at Lewis and Cudahy (Ongoing): Completed as withdrawal decisions made and volumes sent to Serials.
• Reduce print serials cataloging backlog (Ongoing): Completed to some degree, but cut short upon resignation/injury of Josh Dumas in mid-June. Will remain a goal in FY2012.
• Complete Local holdings record project begun last year. (Spring 2011): Largely done; Josh updated procedures in summer 2011.
• Contribute to planning of institutional repository as it relates to the Serials department (Electronic theses and dissertations). Completed. See Bindery / Preservation section above.

Staff:

• Christa Kileff resigned effective September 10 as Bindery Associate and Sandra Hernandez was hired into the reconfigured position of Preservation Associate and started November 29, 2010. Sherri Saltzman oversaw Bindery operations while the position was vacant.
• Odile May's position remained vacant from February 1, 2010 through September 27, 2010. The job description and justification were rewritten in August, when the job was posted. Ray Clark was hired as Serials Acquisitions Assistant. Steve Pump, Kate Dunn, Martha Spring and a student worker (Charles Nuwagaba) covered the job responsibilities for this position while it was vacant.
• Joshua Dumas, Serials Cataloger, submitted his resignation (effective July 29, 2011).
• Sandra was assigned a library mentor (Ursula Scholz, Head of Access Services), as well as a mentor in the newly formed “Loyola & Me” program.
• Maria Cangco volunteered and appointed as a mentor to Kelsey Williams, hired as Catalog Maintenance and Rapid Cataloging Assistant, in May 2011.

FY2012 Goals with anticipated completion dates:

• Digitization Projects: Create a new scanning station for the digitizing project inside the bindery office. Preservation Associate Sandra Hernandez is taking over the supervision of student workers who are scanning Loyola materials for the Library...
repository, starting with Loyola theses and dissertations. Evaluate work flows and recommend work flow changes as needed. (Starts July 2011; Ongoing)

- Complete major government documents withdrawal project of large serial sets totaling over 800 volumes (August 2011)

- Department statistics: Update individual work forms to include work done on e-resource maintenance (i.e. journal coverage checks in Serials Solutions). Complete training with Ray for reporting and compiling department statistics. (August 2011)

- Post, interview, hire and train Serials Cataloger for position vacated effective August 1, 2011. (September 2011)

- Serials Solutions E-Books module: Work with Monograph Acquisitions and Cataloging to implement and discuss ongoing maintenance for this new module. (Fall 2011)

- “Under Galvin” project: Update Voyager and OCLC for volumes officially withdrawn from “under Galvin”. Currently these records are suppressed in Pegasus, but are still in Voyager. (Fall 2011)

- Catalog JSTOR 8 collection, acquired July 2011 (Fall 2011)

- Discuss and refine work flows for periodicals, especially electronic journals: expand to include maintenance of existing subscriptions (title changes, cessations, cancellations, etc.) as well as new title work flows. (Ongoing; start Fall 2011)

- Project planning for bound volumes in Cudahy to be withdrawn or transferred to storage by summer 2012. (Ongoing, August through Summer 2012)

- Compile remaining W-8 and W-9 forms from serials vendors (January 2012)

- Continue with progression of the ETD project; including new workflow and procedures for scanning thousands of dissertations and theses from Archives to prepare for the upcoming Digital Repository. (Ongoing)

- Significantly decrease backlog of items requiring in-house repair or phase boxes (Spring 2012)

- Complete Health Sciences (LUHS) Print Journal Discards to Cudahy Project. (Timing is dependent on withdrawal process at LUHS)
## SERM Department Statistics

<table>
<thead>
<tr>
<th>Serials Adds / Withdrawals / Maintenance</th>
<th>FY2011</th>
<th>FY2010</th>
<th>Change FY2010</th>
<th>Change FY 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serials titles added (exclude periodicals)</td>
<td>-12%</td>
<td>98</td>
<td>111</td>
<td>12%</td>
</tr>
<tr>
<td>Serials volumes added (exclude periodicals)</td>
<td>179%</td>
<td>2720</td>
<td>974</td>
<td>-16%</td>
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<tr>
<td>Periodical titles added</td>
<td>-67%</td>
<td>4</td>
<td>12</td>
<td>-50%</td>
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<tr>
<td>Periodical volumes added</td>
<td>-47%</td>
<td>1249</td>
<td>2370</td>
<td>17%</td>
</tr>
<tr>
<td>Microform serial units added (incl. periodicals)</td>
<td>11%</td>
<td>194</td>
<td>174</td>
<td>-28%</td>
</tr>
<tr>
<td>Electronic Resource titles added</td>
<td>309%</td>
<td>667</td>
<td>163</td>
<td>-49%</td>
</tr>
<tr>
<td>Electronic Resource units added</td>
<td></td>
<td>2</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Serial titles withdrawn (exclude periodicals)</td>
<td>-69%</td>
<td>78</td>
<td>255</td>
<td>166%</td>
</tr>
<tr>
<td>Serial vols withdrawn (exclude periodicals)</td>
<td>88%</td>
<td>2397</td>
<td>1276</td>
<td>85%</td>
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<td>Periodical titles withdrawn</td>
<td></td>
<td>100%</td>
<td>1</td>
<td>n/a</td>
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<tr>
<td>Periodical volumes withdrawn</td>
<td>78%</td>
<td>16</td>
<td>9</td>
<td>n/a</td>
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<tr>
<td>Local Holdings Records Updated/Created</td>
<td>25%</td>
<td>168</td>
<td>134</td>
<td>n/a</td>
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<tr>
<td>Electronic Resource titles withdrawn</td>
<td>0%</td>
<td>2</td>
<td>2</td>
<td>-60%</td>
</tr>
<tr>
<td>Titles recataloged</td>
<td>112%</td>
<td>591</td>
<td>279</td>
<td>-34%</td>
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<th>Serials Acquisitions Statistics</th>
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<tr>
<td>Periodical issues checked in</td>
<td>-6%</td>
<td>13068</td>
<td>13948</td>
<td>-7%</td>
</tr>
<tr>
<td>Microform units checked in</td>
<td>19%</td>
<td>244</td>
<td>205</td>
<td>-15%</td>
</tr>
<tr>
<td>Standing order volumes checked in</td>
<td>-11%</td>
<td>1072</td>
<td>1208</td>
<td>-12%</td>
</tr>
<tr>
<td>Claims issued</td>
<td>-8%</td>
<td>2653</td>
<td>2885</td>
<td>68%</td>
</tr>
<tr>
<td>Voyager record created for analytical items</td>
<td>-13%</td>
<td>487</td>
<td>557</td>
<td>-45%</td>
</tr>
<tr>
<td>Invoices Approved</td>
<td>-3%</td>
<td>939</td>
<td>966</td>
<td>1%</td>
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<tr>
<td>Periodical replacement issues ordered</td>
<td>0%</td>
<td>0</td>
<td>338</td>
<td>1066%</td>
</tr>
<tr>
<td>Periodical replacement issues received</td>
<td>-46%</td>
<td>47</td>
<td>87</td>
<td>867%</td>
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<table>
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<tr>
<th>Electronic Resources</th>
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</thead>
<tbody>
<tr>
<td>Access to Unique E-Journal Titles</td>
<td>37%</td>
<td>52315</td>
<td>38208</td>
<td>53%</td>
</tr>
<tr>
<td>New databases added</td>
<td>79%</td>
<td>25</td>
<td>14</td>
<td>65%</td>
</tr>
<tr>
<td>Access to Online Databases</td>
<td>11%</td>
<td>335</td>
<td>303</td>
<td>5%</td>
</tr>
<tr>
<td>Databases added</td>
<td>171%</td>
<td>38</td>
<td>14</td>
<td>65%</td>
</tr>
<tr>
<td>Databases cancelled/withdrawn/ceased</td>
<td>20%</td>
<td>6</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Check on E-Journal Coverage: no. platforms</td>
<td>49</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Check on E-Journal Coverage: no. titles</td>
<td>800</td>
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<table>
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<tr>
<th>Bindery Statistics</th>
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<tr>
<td>Commercial Binding:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books to Match</td>
<td>-30%</td>
<td>67</td>
<td>96</td>
<td>-1%</td>
</tr>
<tr>
<td>Custom Books</td>
<td>9%</td>
<td>482</td>
<td>441</td>
<td>-24%</td>
</tr>
<tr>
<td>Digicover, Economy</td>
<td>-4%</td>
<td>5579</td>
<td>5802</td>
<td>28%</td>
</tr>
<tr>
<td>Periodicals</td>
<td>-24%</td>
<td>1972</td>
<td>2586</td>
<td>20%</td>
</tr>
<tr>
<td>Theses</td>
<td>-55%</td>
<td>343</td>
<td>757</td>
<td>5%</td>
</tr>
<tr>
<td>Phase Boxes</td>
<td>-100%</td>
<td>0</td>
<td>77</td>
<td>-23%</td>
</tr>
</tbody>
</table>

| In-House Binding:                       |        |        |               |               |
| Pamphlets (hard, soft)                  | -18%   | 198    | 242           | -15%          |
| Repairs                                 | -37%   | 221    | 353           | 5%            |

*NOTE: June 2011 stats for Josh Dumas not available*

*NOTE: SerAcq position vacant Feb-Sept 2010; Bindery position open Sept. 10-Nov. 29, 2010*
SYSTEMS DEPARTMENT (FY11)
Prepared by Chulin Meng, Head of Library Systems

Highlights

- **Library Website Redesign** – Finished the redesign of library website. The new website features updated contents, better navigation structures, and a template that provides a unified web presence for library and other Loyola sites. Moreover, the new site runs on Drupal CMS, which enables us to further improve the workflow for maintaining and updating website content in the future.

- **Digital Repository** – Created a project plan for DR implementation; convened a committee of stakeholders from the University Libraries and Archives to implement the Digital Repository; finished the survey of university faculty to assess scholarly communication practices and awareness of open access issues and institutional repositories; defined content and scope of digital repository; developed the functional requirements and selected the software platform.

- **Electronic Thesis and Dissertation** - Worked with ETD committee and Graduate School to define the License and Distribution Agreement, which enable library to distribute electronically submitted thesis and dissertations via digital repository and other online applications. The agreement was integrated into the ETD online submission process.

- **Online Forms** – Redesigned all interactive forms on the University Libraries website to use PHP as the back-end technology and allow for storage of submitted information in a web-accessible MySQL database. This is a necessary step for us to move library website to a Drupal CMS powered platform.

- **Mobile Access** - Designed and implement a mobile version of Pegasus OPAC for smart phones and other handheld devices; Created a list of selected library information and resources that are accessible through mobile devices; Participated in Loyola Mobile Central project.

- **Voyager ILS** – Worked with Access Services to make it possible for patrons to place recall and holds request online through OPAC.

More Projects Completed by Systems Department

1. Redesigned Serials Solutions e-journal and OpenURL linking interface to match university web template and style.
2. Improved the display of library hours on the Libraries web site and develop an application to allow Library Departments to maintain their own hours using Google Calendar and have the data feed to the web site.
3. Updated the floor maps of Cudahy Library on University Libraries web site.
4. Redesigned online Course Reserves submission application.
5. Implemented Drupal as the Content Management System for collaborative maintenance of library web site.
6. Updated the Pegasus Express Stations to improve the OPAC display.
7. Worked with ITS to perform server vulnerability assessment.
8. Planned the thesis and dissertation digitization project; supervised student assistants to digitize dissertations.
10. Designed reports to capture statistics for books browsed by patrons inside the libraries.
11. Keep E-book collections and Article databases list up-to-date as OCLC making progress with getting permissions from more content vendors;
12. Participate in the Beijing Center library retrospective cataloguing project;
13. Removed SSN from library patron records.

Review of FY11 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 FY11 specific goals:

- WorldCat Local: Worked with OCLC to explore possible solutions for the Multiple Records for the same title issue; Kept E-book collections and Article Databases list up-to-date as OCLC making progress with getting permissions from more content vendors; Made Loyola thesis and dissertation, as well as CONTENTdm special collections accessible through WorldCat Local; Kept Loyola holdings in sync between Voyager and WorldCat databases.
- Library Website: Worked with the Web team to develop a new version of library web site more in line with IC, Archives, WLA and other university sites; Conducted focus groups on the usability of the library site; Updated the library website content.
- Digital Repository: Finished the planning for the development of digital repository; Formed advisory committee and implementation team; Assessed user needs and define content scope; Selected Digital Commons as the software platform.
- Mobile Access: Designed and implement a mobile version of Pegasus OPAC for smart phones and other handheld devices; Made selected library information and resources accessible through mobile devices; Participated in Loyola Mobile Central project.
- Voyager Analyzer and Customized reports: Created reports and provided statistics data for collections analysis and usage statistics.
- E-Book Management: Participated in the EBL patron driven e-book acquisition services project; Adding more E-books to Pegasus and WorldCat Local;
- Online Forms and Internal Staff Web: Redesigned current library online forms to add archiving function; Added new forms per library departments requested;

**Departmental Goals for FY12**

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

1. **Voyager 8 Upgrade**: Plan and implement Voyager 8 upgrade to take advantage of new system functionalities, such as global data change capability. Version 8 will also support Windows 7 and Office 10.
2. **Library Website**: Launch redesigned Drupal based website; Define workflow for maintaining and updating website content; Create instruction guides for library web maintenance; Provide training for Web Team members and other interested parties; Continue to improvement mobile site; Upgrade staff website to match new design.
3. **Digital Repository**: Finish the initial implementation and customization of Digital Commons platform; Arrange trainings for Digital Repository Implementation Team members; Define repository policy and workflow; Provide trainings to subject liaisons;
4. **Windows 7 upgrade**: Perform library software compatibility testing; Upgrade or replace library utility applications to be compatible with Windows 7; Deploy Win 7 and Office 10 once ITS makes the new image available; Switch to MS Active directory from Novell.
5. **Library Servers**: Install new Voyager server; Upgrade Windows based server OS to Win 2008; Upgrade Linux server OS to Red Hat 6.
6. **Web-Scale Library Management System**: Work with the Next-Gen ILS Exploratory Committees to explore the possibility of a new library management system.
7. **Archivists’ Toolkit**: Work with WLA and University Archives to implement Archivists’ Toolkit as the collection management tool; Explore the possibility of providing direct web access to archival records for patrons using XTF application.
Loyola University Chicago Archives and Special Collections

Annual Report

FY11

Kathy Young, University Archivist
August 3, 2011
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<td>15</td>
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<td>18</td>
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</table>
Introduction

FY11 was another busy one at the Loyola University Chicago Archives and Special Collections. The former Archives Associate was replaced and a new graduate student assistant for the Congressional Archives was hired, increasing the staff by one person. Reference inquiries increased steadily as the department continued to focus on improving access to the collections by putting more finding aids online, adding collection level archival catalog records to Pegasus and OCLC, processing collections in the backlog, and beginning to catalog volumes from the rare book collection. Following are some of the highlights for FY11. See appendices A – F for details.

Access

Access continues to be the primary focus of the University Archives and Special Collections department with FY11 showing continued progress in this area. The addition of archival collection and rare book catalog records to OCLC and the OPAC, the steady increase of finding aids available online, and the implementation of MPLP for processing selected collections are just some of the ways the department working on this goal. Following are some of the accomplishments, with further details available in appendix B.

- **Catalog records**
  
  During FY11 one hundred and two (102) records have been added to Pegasus for archival collections and rare books. Thirty-five original catalog records have been created for archival collections, bringing the total number of archival collection records available in Pegasus to ninety-three (93). Forty-two records have been added to Pegasus for the rare book collection. Of these records, twelve (12) were original records created by archives staff. The books cataloged this year included the sixteen (16) transferred to the Archives and Special Collections department by Jonathan Canning, curator of the D’Arcy collection. Finally, individual cataloging of the broadsides gifted by Thomas and Jo-Ann Michalak has begun with the initial addition of twenty-six (26) records to the catalog.

- **Finding Aids**
  
  One hundred and ten (110) finding aids are now available online through the University Archives and Special Collections website. Updates and corrections continue to be made to existing finding aids so they can be placed online. The new associate archivist, Ashley Howdeshell, has begun encoding existing finding aids in EAD so they can be placed online and submitted to catalogs such as ArchivesGrid and the Black Metropolis Research Consortium (BMRC) portal.

- **Digital Collections and Exhibits**
  
  During FY11 archives staff have focused on creating digital exhibits using Omeka. These exhibits include the conversion and enhancement of previously existing digital exhibits including Hidden Loyola (Ashley Howdeshell), Loyola Traditions (Melinda Leonard), Loyola Chronology (Chris Barbuschak), and Jesuits and the Sciences (Kathy Young). Exhibits in progress include Edifying and Curious Letters: Jesuits and the exploration of the Americas (Kathy Young), Dan Rostenkowski (Eric Jankowski), and Raymond V. Schoder, S.J., on Gerard Manley Hopkins (Eric Jankowski). In addition to these exhibits, one hundred and twenty-three (123) items were added to the Loyola University Chicago Archives and Special Collections page on the Internet Archive as The Loyolan, Dentos, and the Stritch School of Medicine yearbooks from 1924 to 2001, and the St. Ignatius Collegian from 1901 to 1921 were digitized through the CARLI Book
Digitization project, bringing the number of items available through the Internet Archive to one hundred forty-one (141).

**Congressional Archives**

During FY11 the finding aid for the Ways and Means series was placed online. Finding aids for the audio-visual series and the general series have been started.

**Acquisitions**

Approximately 221.02 linear feet of records and papers (164.02 at the University Archives and 57 at the Congressional Archives) were added during FY11, a decrease of 61%. This decrease directly reflects the one time acquisition of 400+ linear feet of Cuneo records that occurred during FY11. Compared to the more average acquisition rate of 150.39 linear feet in FY09 acquisitions in FY11 increased by 46%. Acquisitions in FY11 include:

- Dental School records: 18.0 ft
- Rosemarie Parse papers: 40.5 ft
- Raymond C. Baumhart, S.J., records: 18.0 ft
- Smajo Photograph Collection: 1.5 ft
- UMC records: 8.0 ft
- Thomas Sheehan papers: 19.1 ft
- Keith J. Esenther, S.J., photograph collection: 1.0 ft
- Theology department records: 1.5 ft
- Philosophy department records: 30.0 ft
- Illinois Supreme Court Retired Justices oral histories: 0.25 ft

**Congressional Archives**

Fifty-seven (57) linear feet of Rostenkowski papers were received during FY11 including scrapbooks, framed items, and campaign papers. Archives staff continues to work with former staff members of Henry Hyde and the Rostenkowski family to acquire more papers.

**Processing**

During FY11 442.38 ft was processed (University Archives: 297.38 ft, Congressional Archives: 145 ft), an increase of 57% over FY10. This increase was made possible by the addition of Ashley Howdeshell to the staff as associate archivist. Since joining the staff in November of 2010 Ashley has processed 86.75 ft. Also during FY11 Kathy Young processed 79.97 ft, Melinda Leonard processed 66.2 ft, and interns and volunteers processed 64.46 ft.
**Collections processed include**

- Correspondence Study Division records: 34.25 l ft
- College of Arts and Sciences, Classical Studies Department records: 4.5 l ft
- College of Arts and Sciences, English Department records: 16.0 l ft
- Autograph Collection: 15.5 l ft
- B. G. Gross papers (completed): 45.5 l ft
- Kane Collection: 19.5 l ft
- Raymond V. Schoder, S.J., papers: 20.73 l ft
- William Thompson, S.J., papers: 14.2 l ft
- Robert Broderick papers: 15.26 l ft
- J. Donald Roll, S.J., papers: 2.0 l ft
- Robert C. Hartnett, S.J., papers (completed): 17.5 l ft
- Catherine Jarrott, PhD, papers: 5.5 l ft

**Congressional Archives**

During FY11 Laura Berfield finished processing the remaining 70 lft of the Ways and Means series in the Rostenkowski papers in addition to beginning on series 3 – Legislative records. The Congressional Archives graduate student, Eric Jankowski, began processing the General series and completed approximately 75 lft of subseries including the ones for Chicago, Clippings, Congrats & Condolences, Crank Correspondence, Daily Reminders, Democratic Party, Illinois, Military, Newsletters, Matters Handled by Rostenkowski, Poland, Presidential Inaugurations, Press Releases/Conferences, Questionnaires, Rostenkowski Biographies, Travel, and Veterans.

**Reference**

A total of 669 reference inquiries were received at the Archives and Special Collections during FY11, an increase of 7% over the previous year. Reference inquiries received via email continue to grow with an increase of 18% over the previous year. The majority of such requests were received from external researchers. There was also a slight increase in the number of phone inquiries received as well as a slight decrease in the number of in-person researchers.

**Congressional Archives**

During FY11 the Congressional Archives began receiving reference inquiries for the Rostenkowski papers. One telephone inquiry was received and answered while June saw the first two in-person researchers make use of the Rostenkowski papers. One of the June researchers also had permission to access the Hyde papers regarding the Hyde amendment.
Outreach

Exhibits and special projects continue to be the mainstay of outreach at Archives and Special Collections. During FY11 several exhibits were created for the Donovan reading room space; this has provided staff with more experience in creating large-scale exhibits resulting in improvements with each succeeding exhibit.

Exhibits

- Loyola Campus Architecture, May –November 2011
- 150th Anniversary of the start of the Civil War, January – May 2011
- Cudahy Library 2nd floor displays:
  - Archives Month, September 2009 to December 2009
  - Winter Scenes on the Lake Shore Campus, December 2009 to February 2010
  - Catholic Women Poets, February 2010 to May 2010
  - 19th Century British Caricature: Napoleon in Caricature, May 2010-

Special and Ongoing Projects

Black Metropolis Research Consortium (BMRC)

BMRC archivists spent five days at the University Archives and Congressional Archives in February surveying the collections for inclusion in the BMRC portal.

Dental School records

In March of 2011 the University Archivist was notified by the General Counsel that the Dental School records had been returned by an outside attorney. Two trips have been made to the storage areas to survey and select record to be transferred to the archives. Eighteen linear feet of records have been transferred, approximately 110 lft are waiting to be transferred.

Hank Center Spring Symposium

In April the Hank Center held its annual Spring Symposium featuring Dr. Gustav Leone of the Department of Fine and Performing arts speaking about his efforts to recover the music of the Jesuit missions in South America. Archives and Special Collections prepared a small display of volumes from the rare book collection highlighting Jesuit missions in Central and South America.

Cuneo Museum and Gardens

In November of 2010 the remaining papers of the Cuneo family were collected from the Sacristy at the Cuneo mansion and transported to the archives. These papers included holy cards, correspondence, and prayer books. Also in November the inventory of the library at the Cuneo mansion was completed.
Newberry Library Joint Acquisitions

In spring of 2011 the Loyola Libraries completed its third joint acquisition with the Newberry Library purchasing *Opuscula praecatio ad iesum* by Erasmus (Venice, 1524). Loyola now co-owns a total of six titles of Jesuitica and Catholic theology, including one 24 volume set, with the Newberry Library.

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. During FY11 twenty-five interviews were conducted with staff and alumni from the Athletic department as well as alumni who were staffers for the Loyola News/Loyola Phoenix during the 1960s and 1970s.

CARLI Book Digitization Initiative

In September 2010 two proposals were accepted by the CARLI Book Digitization Initiative for digitizing the Loyolan, Dentos, and the Medical School yearbooks as well as issues of the St. Ignatius Collegian/Loyola University Magazine from 1901 to 1921. These volumes were digitized in April of 2011 and are available on the Loyola University Chicago Archives and Special Collections Internet Archive webpage as of May 2011. Alumni Relations has also created a webpage linking to the yearbooks.

Catholic Research Resources Alliance (CRRA)

In December of 2010 approximately 550 records were exported to the Catholic Research Resource Alliance (CRRA) to be added to their catalog of Catholic resources. A pilot project of adding ‘crra’ to field 599 in catalog records has been started. This addition to the catalog records should allow Library Systems to easily pull records to be sent to the CRRA catalog.
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. In FY10 she was elected to a second term on the board of directors for the Black Metropolis Research Consortium.

Ashley Howdeshell, MLS, Associate Archivist
Ashley joined the Archives and Special Collections staff in November 2010 replacing Rebecca Hyman who resigned in June 2010. Ashley obtained her MLIS from Indiana University with a specialization in archives and records management. During her first eight months she has processed 86.75 lft of collections, started implementing EAD for finding aids, curated the exhibit on the 150th anniversary of the beginning of the Civil War as well as assisting in the creation of the Loyola campus architecture exhibit, and assisted in surveying records of the dental school.

Laura Berfield, MLS; Political Papers 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. In September of 2009 her position was made full-time. She is currently processing the Rostenkowski papers and helped in the survey of the dental school records.

Melinda Leonard, Graduate Assistant, Archives and Special Collections
Melinda started at the University Archives in August of 2009. She processed approximately 178 l ft of collections during her two years as the graduate assistant, assisted with exhibition planning and design, worked on digital projects, accessioned collections, and assisted with surveying and packing the records at Cuneo and surveying the dental school records. Melinda graduated with a Masters in Public History in May 2011 and left the archives for a full time job in June of 2011.

Maria Reynolds, Graduate Assistant, Loyola Oral History Project
Maria returned as the graduate assistant for the Loyola Oral History project on July 1, 2009. She originated the position when it was created in 2006. During the past five years Maria has conducted interviews for the School of Social Work, the Institute of Pastoral Studies, Athletics, Rome Center, and Cuneo. Maria graduated with a Ph.D. in American and Public History in May of 2011. She left the archives at the end of June 2011.

Eric Jankowski, Graduate Assistant, Congressional Archives
Eric started at the Congressional Archives in November of 2010. During the past several months he has processed approximately 75 lft of Rostenkowski papers, and developed online and physical exhibits about Rostenkowski. Eric is currently working on his masters in history.

Katie Reinike, Practicum student
Katie did a practicum for her MLIS at Dominican University during the spring of 2011. While at the archives she processed a collection of approximately 7.0 lft, attended meetings and workshops, and assisted with the planning of the Loyola Campus Architecture exhibit.

Chris Barbuschak, Intern and volunteer
Chris is a senior in the History department. During fall 2010 he interned at the archives and processed the Rosemary Donatelli papers and the Barbara Hirschfeld (director of the Cuneo museum and gardens) records. He started volunteering at the archives in the spring of 2011 and has updated and enhanced the Loyola Chronology online exhibit, processed a series in the Catholic Church Extension Society records, and assisted in the creation of the Loyola Campus Architecture exhibit.

Judith Tichacek, Intern
Judith interned at the archives during the fall of 2010. While at the archives she processed the Catherine Jarrott papers.

**James Thompson, Volunteer**  
James had previously volunteered at the archives in 2009 and came back in spring 2011 after finishing his MLIS at the University of Illinois. While at the archives he processed several collections including the Robert Broderick papers and the Cuneo Museum administrative records.
FY11 Goals

- **Continue improving access to collections by**
  - Adding 10 to 15 more catalog records to Pegasus and OCLC – *34 archival collection records added to bring the total to 92; 26 records added for the Michalak broadsides; 42 records for rare books including 12 original records.*
  - Posting updated legacy finding aids, reformatted or not - *ongoing*
  - Continuing to open processed series of the Rostenkowski papers and posting finding aids online for those series - *ongoing*
  - Creating a comprehensive up-to-date finding aid for the Rostenkowski papers - *ongoing*
  - Working with the Digital Services Librarian to create at least 1 enhanced digital collection, possibly based on oral histories – *Alternatives are being explored, including the use of Omeka for exhibits, as this is not a priority for the DSL.*
  - Work with the Digital Services Librarian to create an EAD template – *Archives staff has begun coding finding aids with EAD and exploring alternatives to working with the DSL such as contacting the university web team/ITS about designing a CSS and possibly creating an EAD template.*
  - Creating an advisory committee for the rare book collection to develop ideas for collection development and use according to the needs of faculty and students – *Have talked to several faculty members to get their opinions on the formation of such a group. Some interest expressed.*

- **Continue developing a more organized outreach program – Ongoing. New brochure is in development and will be available be August 2011.**
  - Targeting Loyola faculty, students, and alumni
  - Informing administration and staff about the archives and records management
  - Informing a broader audience about the archival and rare book collections

- **Create a 2-year strategic plan focusing on – postponed. Instead continuing to focus on improving access to collections.**
  - Collection development in relation to the university’s and libraries’ strategic plan
  - Improving and promoting access to collections

- **Finish special projects**
  - Finish inventory of Cuneo library; obtain appraisal for select volumes – *Inventory finished November 2010. Decision needs to be made about whether or not select volumes should be appraised for value.*
- Transport remaining archival records/papers to Cudahy Library – *Completed November 2010*. All identified records at the Cuneo mansion in Vernon Hills have been surveyed and transported to Cudahy Library.
FY12 Goals

- Continue to improve access to collections
  - Catalog records – add another 10 to 20 (minimum)
  - Legacy and new finding aids – continue putting online as PDFs and EAD encoding
  - Continue implementing MPLP for select collections to reduce backlog
  - CRRA – continue selecting items to be added to the Catholic portal
  - Finish processing Rostenkowski papers
  - Begin preliminary processing of Hyde papers

- Rare Book Collection
  - Conduct inventory; have a preliminary report on findings by December 2011
  - Continue cataloging books from collection currently not in the OPAC
  - Add records for Michalak Collection books to OPAC
## Appendix A: Comparative Yearly Statistics FY04 to FY11

<table>
<thead>
<tr>
<th>% Change</th>
<th>FY11</th>
<th>FY10</th>
<th>FY09</th>
<th>FY08</th>
<th>FY07</th>
<th>FY06</th>
<th>FY05</th>
<th>FY04</th>
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<tr>
<td>(9)</td>
<td>95</td>
<td>105</td>
<td>72</td>
<td>135</td>
<td>98</td>
<td>124</td>
<td>102</td>
<td>109</td>
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<td><strong>Phone Calls – External</strong></td>
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</tr>
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<td>24</td>
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<td>73</td>
<td>78</td>
<td>96</td>
<td>78</td>
<td>87</td>
<td>96</td>
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<td><strong>E-mails</strong></td>
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</tr>
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<td>18</td>
<td>316</td>
<td>266</td>
<td>311</td>
<td>562</td>
<td>226</td>
<td>228</td>
<td>223</td>
<td>120</td>
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<td><strong>Letters</strong></td>
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<td>(67)</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>7</td>
<td>10</td>
<td>9</td>
<td>9</td>
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<td><strong>On-Site Researchers</strong></td>
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<td>(5)</td>
<td>166</td>
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<td>111</td>
<td>201</td>
<td>215</td>
<td>205</td>
<td>199</td>
<td>134</td>
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<tr>
<td><strong>ILL</strong></td>
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<td>4</td>
<td>2</td>
<td>0</td>
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<td>5</td>
<td>6</td>
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<td><strong>Total Internal Requests</strong></td>
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<td>360</td>
<td>344</td>
<td>328</td>
<td>705</td>
<td>377</td>
<td>426</td>
<td>306</td>
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<td><strong>Total External Requests</strong></td>
<td>10</td>
<td>309</td>
<td>282</td>
<td>248</td>
<td>296</td>
<td>253</td>
<td>232</td>
<td>329</td>
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<td><strong>Total Research Inquiries</strong></td>
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<td>669</td>
<td>626</td>
<td>576</td>
<td>1001</td>
<td>630</td>
<td>658</td>
<td>635</td>
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<tr>
<td><strong>Number of Acquisitions</strong></td>
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<td>38</td>
<td>54</td>
<td>54</td>
<td>49</td>
<td>37</td>
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<td>59</td>
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<td><strong>Linear Feet</strong></td>
<td>(60)</td>
<td>221.02</td>
<td>564.3</td>
<td>150.39</td>
<td>232.15</td>
<td>468</td>
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<td><strong>L FT Processed</strong></td>
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<td>442.38</td>
<td>280.5</td>
<td>156.14</td>
<td>63.25</td>
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<td><strong>Dissertations and Theses</strong></td>
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<td>324</td>
<td>200</td>
<td>173</td>
<td>233</td>
<td>177</td>
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<td>----</td>
<td>3,700</td>
<td>3,604</td>
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Appendix B: Catalog Records Created & Finding Aids online

FY11 Catalog records added to OPAC

Kane Collection
Office of the Treasurer records
Office of the Treasurer - ledgers
B. G. Gross papers
Raymond V. Schoder, S.J., papers
Correspondence Studies Division records
Autograph Collection
Nevett Fund of America records
Robert Broderick papers
CCES: American Board of Catholic Missions records
  Chapel Car records
  Historical Letters and Documents
  Publications
  Wills and Estates
Cuneo: Administration records
  Barbara Hirschfeld records
  Hawthorn Farm Construction records
Rosemary V. Donatelli papers
Dorr E. Felt collection
Martin Heidegger collection
Catherine Jarrott, Ph.D., papers
Charles Nelson Johnson papers
George Ireland, Athletic Director, records
CAS Assoc. Dean – WTC records
Office of Community Programs records
Academic and Administrative Council records
SON: Golden Jubilee Celebration records
Office of the Dean records
Rosemarie Rizzo Parse papers
Edward W. Schneider papers
Leona Marie Smolinski papers
Illinois Supreme Court retired Justices oral histories
Chicago College of Dental Surgery yearbooks
Medical School yearbooks
Loyola University of Chicago yearbooks

**Finding aids created/updated and placed online during FY09**

1) **Administration**
   - *Kane Collection* (new)
   - *Office of the Treasurer – Ledgers, records* (updated)
   - *Office of Community Programs records* (updated)
   - *George Ireland records* (new)
   - *Alice Bourke Hayes records* (updated)
   - *James T. Hussey, S.J., records* (updated)
   - *Richard Matre records, VP and Dean of Faculties records* (updated)
   - *Robert Mulligan, S.J., VP and Dean of Faculties records* (updated)

2) **Colleges/Schools**
   - *Correspondence Study Division records* (new)
   - *College of Arts and Sciences Associate Dean, Water Tower Campus* (new)

3) **Faculty & Staff**
   - *Rosemary Donatelli papers* (new)
   - *Catherine Jarrott papers* (new)
   - *B.G. Gross papers* (new)
   - *Wilma Spurier papers* (new)
   - *Raymond V. Schoder, S.J., papers* (new)
   - *Edward M. Schneider papers* (new)
   - *Charles N. Johnson papers* (new)
   - *J. Donald Roll, S.J., papers* (new)

4) **Catholic**
   - *Nevett Fund of America records* (new)
   - *Robert Broderick papers* (new)
CCES: American Board of Catholic Mission records (new)
CCES: Historical Letters (new)
CCES: George Hennessey, Superintendent of Chapel Cars, correspondence (new)
Holy Family Parish records (updated)

5) Cuneo

Hawthorn Farm construction records (new)
Office of the Director, Barbara Hirschfeld records (new)
Administrative records (new)
Appendix C: Digital Collections

Total Digital Collection Stats (All Collections)

<table>
<thead>
<tr>
<th></th>
<th>% Change</th>
<th>FY11</th>
<th>FY10</th>
<th>FY09</th>
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<td>Hits</td>
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<td>2,023,670</td>
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<td>Files</td>
<td>3</td>
<td>1,957,118</td>
<td>1,888,375</td>
<td>79,423</td>
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<td>Visits</td>
<td>83</td>
<td>19,858</td>
<td>8087</td>
<td>720</td>
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University Archives and Special Collections only

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<thead>
<tr>
<th></th>
<th>% Change</th>
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<th>FY09</th>
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<td># of Compound Objects</td>
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<td>57</td>
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<tr>
<td># of JP2</td>
<td>12</td>
<td>872</td>
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<tr>
<td># of JPG</td>
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Internet Archive Webpage Downloads

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<td>Loyolan</td>
<td>24</td>
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<tr>
<td>Dentos</td>
<td>0</td>
</tr>
<tr>
<td>Stritch School of Medicine yrbks</td>
<td>2</td>
</tr>
<tr>
<td>St. Ignatius</td>
<td>2</td>
</tr>
<tr>
<td>Collegian/Loyola University Magazine</td>
<td></td>
</tr>
<tr>
<td>Illinois Catholic Historical Review</td>
<td>794</td>
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<tr>
<td>Chicago</td>
<td>125</td>
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<tr>
<td>Chicago Magazine</td>
<td>29</td>
</tr>
<tr>
<td>McVickers</td>
<td>24</td>
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<tr>
<td>Doomed City</td>
<td>52</td>
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<td>History of Chicago</td>
<td>33</td>
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<td>Tourists Guide</td>
<td>31</td>
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<td>Chicago and its resources</td>
<td>99</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>1006</strong></td>
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Appendix D: Acquisitions FY11

<table>
<thead>
<tr>
<th>Source</th>
<th>Materials</th>
<th>Linear Feet</th>
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<tbody>
<tr>
<td>Jeanne Goessling</td>
<td>yearbooks</td>
<td>0.5</td>
</tr>
<tr>
<td>Yolande Wersching</td>
<td>Lewis Library slides</td>
<td>3.00</td>
</tr>
<tr>
<td>CAS Dean's Office</td>
<td>bulletins &amp; commencement programs</td>
<td>2.00</td>
</tr>
<tr>
<td>Wendy/Special Events</td>
<td>Commencement videos and photographs (DVDs)</td>
<td>0.5</td>
</tr>
<tr>
<td>Alumni relations</td>
<td>records</td>
<td>0.5</td>
</tr>
<tr>
<td>Rosemarie Parse</td>
<td>papers (27 boxes)</td>
<td>40.5</td>
</tr>
<tr>
<td>Raymond C. Baumhart, S.J.</td>
<td>records, from office in Sullivan (12 rc's)</td>
<td>18</td>
</tr>
<tr>
<td>Mary Ellen Smajo, Ph.D.</td>
<td>Loyola News and Cadence</td>
<td>1.5</td>
</tr>
<tr>
<td>MaryAnn McDermot</td>
<td>papers</td>
<td>0.5</td>
</tr>
<tr>
<td>Mark Beane</td>
<td>UMC - Loyola world photos/slides/negs</td>
<td>8</td>
</tr>
<tr>
<td>Bryn Dugre</td>
<td>Ethics Center records (Philosophy dept.)</td>
<td>30</td>
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<tr>
<td>Justin Law/Il Sup Ct. Hist.</td>
<td>2 DVD's, 2 CDs - Ill Supreme Court Justice oral</td>
<td></td>
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<tr>
<td>Preservation Commission</td>
<td>histories</td>
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<tr>
<td>David Bryant</td>
<td>4 reel-to-reel tapes of Fr. Grant</td>
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<tr>
<td>Keith J. Esenther, S.J.</td>
<td>1 xhd with photos</td>
<td>0.25</td>
</tr>
<tr>
<td>Cuneo</td>
<td>photos, correspondence, books, lps</td>
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</tr>
<tr>
<td>Thomas Sheehan</td>
<td>Papers from Loyola tenure</td>
<td>19</td>
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<tr>
<td>Kathleen DeLaney, Canisius</td>
<td>1933 World Fair Guidebook (1 vol.)</td>
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<tr>
<td>Spencer Wallace</td>
<td>papers</td>
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<tr>
<td>Keith J. Esenther, S.J.</td>
<td>33 CD's with photographs</td>
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</tr>
<tr>
<td>School of Social Work</td>
<td>Joseph Walsh, Dean, records</td>
<td>4</td>
</tr>
<tr>
<td>Raymond C. Baumhart, S.J.</td>
<td>papers</td>
<td>3</td>
</tr>
<tr>
<td>Karen - U of Michigan</td>
<td>Fr. Grollig papers</td>
<td>1</td>
</tr>
<tr>
<td>Ellen Kane Munro, General</td>
<td>Dental School records</td>
<td>18</td>
</tr>
<tr>
<td>Counsel</td>
<td>Rome Center records</td>
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<tr>
<td>Kate Felice</td>
<td>Rome Center photos</td>
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</tr>
<tr>
<td>Katie Hession</td>
<td>records</td>
<td>1.5</td>
</tr>
<tr>
<td>Ruth Davis</td>
<td>Ellis C. Johanson, DDS, papers</td>
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</tr>
<tr>
<td>Theology department</td>
<td>records</td>
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</tr>
<tr>
<td>Mary Erlenborn</td>
<td>Loyola phoenix issues</td>
<td>1.5</td>
</tr>
<tr>
<td>Tom Haney</td>
<td>papers</td>
<td>4.25</td>
</tr>
<tr>
<td>Peggy Cusik</td>
<td>Loyola papers</td>
<td>0.25</td>
</tr>
<tr>
<td>Will Osborne</td>
<td>NIT pageboy hat</td>
<td>0.25</td>
</tr>
<tr>
<td>Paul Stewart</td>
<td>NCAA Champ sweater, programs</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Rare Books

*Opuscula praecatio ad Iesum* by Erasmus (Venice, 1524)

(Joint acquisition with the Newberry Library)
**Appendix E: Collections Processed**

**University Archives**

Kane Collection 19.5 lft  
Office of the Treasurer – Ledgers 124 volumes (ledgers)  
Office of the Treasurer – records 1.75 lft  
B. G. Gross 45.5 lft  
Raymond V. Schoder, S.J., papers 20.72 lft  
Wilma Spurier papers 6.5 lft  
Correspondence Study Division records 34.25 lft  
George Ireland records 1.75 lft  
Edward Schneider papers 3.5 lft  
Robert Broderick papers 15.26 lft  
CCES: historical letters 1.25 lft  
CCES: American Board of catholic missions 3.0 lft  
CCES: George Hennessey correspondence 1.25 lft  
Nevett Fund of America records 10.45 lft  
Holy Family Parish ledgers 7.0 lft  
Hawthorn Farm construction records 4.0 lft  
Cuneo – office of the director, Barbara Hirschfeld records 8.0 lft  
Charles N. Johnson papers 1.0 lft  
J. Donald Roll papers 2.0 lft  
Catherine Jarrott papers 5.5 lft  
CAS: Associate Dean – Water Tower Campus records 14.5 lft

**Congressional Archives**

Ways and Means 102 lft

**Total** 420.38
# Appendix F: Loyola Oral History Project

## List of Interviews 2010-2011

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Location</th>
<th>Loyola Department</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Athletics</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 John McCabe</td>
<td>8/20/2010</td>
<td>Information Commons, LSC</td>
<td>Athletics - Alumni</td>
</tr>
<tr>
<td>2 John Reilly</td>
<td>9/30/2010</td>
<td>Information Commons, LSC</td>
<td>Alumni/Volunteer</td>
</tr>
<tr>
<td>3 Doug Bruno</td>
<td>10/26/2010</td>
<td>DePaul University</td>
<td>Athletics - Coach</td>
</tr>
<tr>
<td>4 Rick Wemple</td>
<td>11/10/2010</td>
<td>Information Commons, LSC</td>
<td>Athletics - Coach</td>
</tr>
<tr>
<td>5 John Planek</td>
<td>11/23/2010</td>
<td>Information Commons, LSC</td>
<td>Athletics - Athletic Director</td>
</tr>
<tr>
<td>6 Richard Norman</td>
<td>12/1/2010</td>
<td>5901 Sheridan Road, 1775 Glenview Rd.</td>
<td>Alumni/Coach</td>
</tr>
<tr>
<td>7 Paul Akers</td>
<td>12/7/2010</td>
<td>Glenview, IL 7525 N. Linder Rd. Skokie, IL</td>
<td>Athletics - Alumni</td>
</tr>
<tr>
<td>8 Tom Cooney</td>
<td>12/8/2010</td>
<td>IL</td>
<td>Athletics - Alumni</td>
</tr>
<tr>
<td>9 Bill Behrns</td>
<td>1/18/2011</td>
<td>Alumni Gym, LSC</td>
<td>Athletics - Staff</td>
</tr>
<tr>
<td>10 Adam Kwiatkoski</td>
<td>1/26/2011</td>
<td>Information Commons, LSC</td>
<td>Alumni/Coach</td>
</tr>
<tr>
<td>11 Brendan Eitz</td>
<td>1/27/2011</td>
<td>Information Commons, LSC</td>
<td>Alumni/Coach</td>
</tr>
<tr>
<td>12 John Lynch</td>
<td>1/31/2011</td>
<td>Forest, IL</td>
<td>Athletics - Alumni</td>
</tr>
<tr>
<td>Elizabeth Tortorello-Nelson</td>
<td>3/1/2011</td>
<td>Berwyn &amp; Clark</td>
<td>Athletics - Coach</td>
</tr>
<tr>
<td>14 Sr. Jean Schmidt</td>
<td>3/7/2011</td>
<td>25 E. Pearson, WTC</td>
<td>Athletics - Chaplain</td>
</tr>
<tr>
<td>16 Charles Greenstein</td>
<td>4/8/2011</td>
<td>Lincolnwood, IL</td>
<td>Athlete/Coach</td>
</tr>
<tr>
<td>17 Lisa Ryckbosch</td>
<td>4/19/2011</td>
<td>UIC</td>
<td>Athletics - Athlete</td>
</tr>
<tr>
<td>18 Shane Davis</td>
<td>5/10/2011</td>
<td>Norville Center, LSC</td>
<td>Athlete/Coach</td>
</tr>
<tr>
<td><strong>Institute of Pastoral Studies</strong></td>
<td></td>
<td></td>
<td>IPS Part Time</td>
</tr>
<tr>
<td>1 Gerard Egan</td>
<td>10/27/2010</td>
<td>Information Commons, LSC</td>
<td>Faculty</td>
</tr>
<tr>
<td>2 Eileen Daily</td>
<td>3/1/2011</td>
<td>Information Commons, LSC</td>
<td>IPS Faculty</td>
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<tr>
<td><strong>Long Term Employees</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>1 John O'Malley</td>
<td>10/5/2010</td>
<td>Maguire Hall, WTC</td>
<td>Business Faculty</td>
</tr>
<tr>
<td><strong>The Phoenix / Loyola News</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Adeshina Emmanuel</td>
<td>5/16/2011</td>
<td>Information Commons, LSC</td>
<td>Current Student</td>
</tr>
<tr>
<td>2 John Deutsch</td>
<td>5/19/2011</td>
<td>Information Commons, LSC</td>
<td>Alumni</td>
</tr>
<tr>
<td>3 Toni Nessi</td>
<td>5/26/2011</td>
<td>945 S. Linden Ave. Elmhurst, IL</td>
<td>Alumni</td>
</tr>
<tr>
<td>4 Adeshina Emmanuel</td>
<td>6/30/2011</td>
<td>Information Commons, LSC</td>
<td>Current Student</td>
</tr>
</tbody>
</table>
1  David James       6/23/2011  5801 N. Sheridan Rd

TOTAL (26 Interviews and 25 People)

2010-2011 Transcripts Completed (17)

Robert O'Gorman  IPS
JoAnn Gazarek    Law
William "Toby"   Law
Pamela Bloomquist Law
James Blachowicz Rome Center
Wendy Cotter     Rome Center
Frank Fennell    Rome Center
Elizabeth Jackson Rome Center
Hall             Rome Center
Thomas Haney     Rome Center
George Hostert   Rome Center
Patricia Jung    Rome Center
Fr. John Kilgallen, SJ Rome Center
Steven Masello   Rome Center
Cissy Pettenon   Rome Center
Jeanne Rooney and Rome Center
Tony Murray      Rome Center
Peter Schraeder  Rome Center
Carol Stitzer   Rome Center
Women & Leadership Archives

FY2011 Annual Report
Prepared by Elizabeth A. Myers, Director

Please note that this report reflects the accomplishments for the Women & Leadership Archives from the close of FY2010 to close of FY2011. The goals as outlined in prior annual reports are often ongoing.

I. Personnel

Elizabeth A. Myers, Director (Maternity leave, 9/10 to 1/11)
Robin Secco, Temporary Director (8/10 to 1/11)
Elizabeth Loch, Graduate Student
Catherine Crosse, Graduate Student
Maria Wagner, Graduate Student
Sutton Skowron, Intern—Dominican, Summer 2010
Julie Wroblewski, Intern—Dominican, Summer 2010
Judith Tichacek, Intern—LUC, Summer 2010
Christine Flynn, Intern—LUC, Spring 2011
J. Curtis Main, Intern—LUC, Spring
Stephanie Fong, Intern—Shimer College, Summer 2011
Rebecca Smith, Intern—Dominican, Summer 2011

II. Accomplishments

1. Intellectual & Physical Control

- **Security:**
  Security remains status quo.

- **Lower Level Storage and the Reading Room:**
  See below: Special Projects

- **Cataloging Projects:**
  An evaluation of the past catalog records for WLA manuscripts reveals a series of dead links between the website, OCLC, and Voyager. As a consequence, most of the MARC records will have to be edited. However, as a result of the major collection move and collection evaluation work done during the summer of 2011, the finding aids for 70% of the collection changed anyway. On a related note, only 20 or so of the WLA monographs have been cataloged, over 400+ remain uncataloged.

2. Acquisitions & Accessions
   Total new: 68.15 linear ft. (+1.9%); 42 new collections, of which 6 were addendums.

3. Processing
   Total completed: 134 linear ft. (+1%); 33 collections were processed, of which 9 were reprocessing projects.
4. **General Reference & Special Reference Projects**
   a. General Statistics (+/- FY2010):
      - In-Person Visits: 96 (-13%)
      - Phone Inquiries: 54 (-50%)
      - Email Inquiries: 50 (-52%)
      - Tours: 14 separate tours / 111 people total (+7.4%)
      - Class Visits: 2 (-33%)

      (*Note that statistics were not gathered from September 2010 to January 2011. In addition, the WLA was only open 2.5 days per week for the same time period. New statistical tracking via excel has been instituted July 2011.)

5. **Special Projects & Events**
   - **Coordinated internships:**
     I coordinated 7 internships, 3 in the summer of 2010, 2 in the spring semester and 2 over the summer 2011. The interns were unpaid (though one received funding from her parent college) and included 3 students from Loyola, 1 from Shimer College, and 3 from Dominican University.

   - **Displays at Cudahy Library & Piper Hall**
     Mundelein College Reunion, 2010, including Class of 1960, Phoenix Class Reception, Class of 1955, Class of 1985, Class of 1965,” Classes ending in 0s and 5s (smaller boards), and “Who? What? When? Where? Help the Archives Identify these Photos,” “Mary Ann Smith: Local Alderwoman” and “The Artists of Artemisia.”

   - **Website**
     New content: “Mundelein College Photograph Collection” (1243 items and growing), Mundelein Class Photos (61 items), Mundelein College Yearbooks (10 items), and Mercedes McCambridge (36 items). Regular updates were added to “Collections,” “News and Events,” “New Acquisitions,” and “Newly Opened Collections” pages.

   - **Speaker Series**
     The WLA continued to host the Speaker Series in 2010-2011. There were 6 speakers, 3 from Theology, 2 from History, and 1 from Philosophy. All were graduate students.

   - **Artemisia Gallery Event**
     A follow up event was held at the WLA for the Artists of Artemisia Archives Project. Thirty-six local artists attended, 22 donated papers, 6 have already added to those “starter” collections. I was also asked to write a newsletter article for the Chicago Cultural Center Artist’s newsletter which was distributed a month later via email.

   - **Peer Review**
     Intern and Loyola graduate student J. Curtis Main completed an institutional peer review of other archives in the Chicago area that were of similar size or larger to the WLA (22 total archives). The purpose of the review was to compare WLA policies, practices, web presence, outreach, accessibility, fees and similar to the WLA peer group. The findings were helpful and will be the basis for a proposal to change some WLA policies and practices in 2011-2012.
• **Reading Room Reorganization**
  Starting in April 2011, the staff of the WLA (Beth, Beth L., Catherine, Maria, Stephanie, and Becca) reorganized the reading room using existing furniture and supplies. With the addition of a computer from the Gannon Center (used), we were able to expand our useable work space for staff, improve the overall aesthetic of the reading room, create clearly designated work/storage spaces, and to improve the logical organization of the work spaces themselves. I believe these changes will improve user and staff experience.

• **Lower Level Reorganization, Collection Evaluation, and Corrections**
  Starting in June 2011 the staff of the WLA (see above) reorganized the entire lower level archival storage. This was an effort to (1) undo the work completed under my temporary replacement which was done in a collection management style incompatible with the WLA, (2) to institute a sustainable system of organization based on past, current, and anticipated future use, and (3) to complete a collection evaluation and immediately deal with the many projects born of that analysis. **Conclusion:** (1) Unprocessed material now exists at the end of the available space (rows 30-33); (2) Oversized contains only oversized material; (3) Mundelein material is stored together; (3) with the new addition of a flat file (July 2011), material unable to fit in oversized will now be safely housed in the flat file. This also gives us room to expand oversized which we did not have and safely store oversized items that we poorly stored; (4) every box of every collection was checked against each individual finding aid. Inconsistencies, poor preservation, poor processing, missing items/folders, spelling mistakes or similar small errors, labeling mistakes, orphaned material, and deaccessioned material, were all noted and dealt with. Though 5 large collections still need attention (full reprocessing) and some Mundelein issues remain, all of the other 162 problems identified have been resolved. The physical move took almost 3 full days, the resolution of problems continues but the bulk was completed within 4 weeks. I consider this a major achievement of my tenure as director. (See appendix A for a full list)

• **Brochures**
  2400 newly printed brochures were created. They form the basis of new donor packets which I send or give to new potential donors. I have already given out 12 such packets and, anecdotally, received positive feedback (e.g., “how professional!”) from donors as a result.

### III. Review of FY2010-2011 Goals

1. **Build a donor database (excel) as an easy-access, easier to update supplement to the case files. Finish reviewing, organizing, and weeding case files for donors.** **Status: Complete**

2. **Continue building the Mundelein College Photograph collection. Add between 300 and 500 images per year minimum on Content DM.** **Status: Complete and exceeded.** We added 1120 new photos.

3. **Explore additional ContentDM projects including Mundelein College yearbooks, class photos, Immaculata yearbooks, class photos, or general exhibits from the manuscripts collections.** **Status: Complete and exceeded**

4. **Continue web development and updates—with emphasis on the regular rotation of content.** **Status: Ongoing**
5. Continue to populate new OCLC / MARC records when collections are processed or a major collection is added to ContentDM. **Status: Ongoing**

6. Process 150 linear feet of material. **Status: Incomplete.** We processed 134 linear feet of material.

7. Continue general outreach internally and externally, including working with Advancement and Alumni Relations. **Status: Complete**

8. Plan and execute the displays for the Mundelein College Reunion, Vespers at Christmas, and up to 2 displays for Cudahy Library. **Status: Incomplete.** Except for the MC Reunion, the Mary Ann Smith Papers Launch, and the Artemisia Artist Event, no other displays were created.

9. Artemisia Event: Women’s History Month. Plan and execute a second event to outreach specifically to women artists. Perhaps create a panel of experts including myself as an archivist, someone from LUMA or the Art Institute, an estate lawyer, and an artist who has a donor experience to share. Also, perhaps a hands-on experience to help answer preservation questions specific to art. **Status: Incomplete**

10. Chicago Women Artists Collective Event. Related to the Artemisia event, this women artists event would address non-Artemisia members in the larger Chicago art community. Interest has been expressed by several local artists who felt excluded by the Artemisia event but are very interested in donating their papers. **Status: Complete.** 22 artists donated papers to the WLA.

11. Monograph and Serials cataloging project. See to fruition the WLA monograph cataloging project—which includes the 400 or so books currently curated in the collection. Set up a system for future additions or purchases to the monograph collection. Work with Martha Spring to repeat this process with the limited number of serials in the collection, specifically the Mundelein College publications. **Status: Incomplete.**

**IV. FY 2011-2012 Goals**

1. Continue building the Mundelein College Photograph collection. Add 500 or more images.

2. Explore additional ContentDM projects (Immaculata High School and Chicago Women Artists).

3. Continue web development and updates—with emphasis on the regular rotation of content.

4. Edit all existing OCLC / MARC records; create new records for 18 newly processed collections, and 6 new digital collections.

5. Process or reprocess 150 linear feet of material.

6. Continue general outreach internally and externally.

7. Plan and execute the displays for the Mundelein College Reunion, Vespers, and the opening of the Phyllis Zagano papers.
8. Review and propose policy changes as a result of the Peer Review (2011), e.g., web changes/edits, explore creating a logo, highlight staff, list classroom projects/instruction options specifically, change fees schedule for photocopying, scanning, etc., better highlight internships, explore the establishment of a formal practicum for LUC students, created PDF of guides for the web, find better ways to highlight work done at the WLA, better highlight collections online and physically.


10. Evaluate the possibility of instituting a new collection management (Archon and/or Archivists Toolkit) system with the cooperation of Kathy Young and Chulin Meng. Also explore possible solutions for the management of the archival born-digital content (possibly D-Space). Both of these actions with result in the dumping of PastPerfect and the recognition that the Digital Repository will not be a viable solution for the Archives digital assets issues.

11. Monograph and Serials cataloging project. See the expansion of the WLA monograph cataloging project which includes the 400 or so books. Work with Martha Spring to repeat this process with the limited number of serials in the collection, specifically the Mundelein College publications.


13. Continue to re-evaluate the WLA forms (reference, registration, copying, copyright), add or edit as necessary.

14. Edit the WLA Policy and Procedures Manual to include: position descriptions, orientation and training checklists, reporting structure of the Gannon Center and Library, list of all forms, location of master forms, Registration procedures for researchers, expected presence and attitude when interacting with researchers, security, restrictions, retrieval and reshelving procedures, rules for the use of materials (more explicit), major equipment inventory, duplication policies, emergency response policies, public programs.

15. Finish (as possible) the projects left from the reorganization of 2011. This includes integrating all of the loose Mundelein College material and starting a minimum of 2 of the remaining major reprocessing projects (Jegen, Thersians, Deborah’s Place, Haney, and Lopata).