

**Self-Study for the Richard A. Gleeson
Library/Charles and Nancy Geschke
Learning Resource Center and
Regional Campus Libraries**

Overall Table of contents for the self-study

Chapter 1 – Introduction

Historical Context
Library Vision and Mission
Library Goals

Chapter 2 – Library Organization, Planning & Assessment

Governance Structure
Planning Process and Strategic Plan
Communication
Assessment & Continuous Improvement
Recruitment and Retention
Staff Salaries and other compensation

Chapter 3 – Budget & Expenditures

Tables & Graphs (.xls files in Appendix)
Development

Chapter 4 – Access Services

History
Technology
Building & Collection use (graphs and tables)
Operations
Recent/Current Projects
Forthcoming Enhancements
Key Challenges
Key Collaborations
Key Contributions

Chapter 5 –Reference & Research Services

History
Organization
Mission-Statement of Purpose & Goals
Usage Trends
Operations
Recent/Current Projects
Key Challenges
Key Collaborations
Key Contributions
Planning & Assessment
Future improvements/services

Chapter 6—Regional Campus Libraries & Distance Learning Services

Introduction, History and Mission
Operations

Services
Key Challenges
Key Collaborations
Key Contributions
Planning
Assessment
Future improvements/services

Chapter 7 – Collections

History
Organizational Chart
Mission-Statement of Purpose & Goals
Trends
Operations
Recent/current Projects
Key Challenges
Key Collaborations
Key Contributions
Planning & Assessment
Future improvements/services

Chapter 8 – Donohue Rare Book Room

Introduction
Operations
Key Challenges
Key Collaborations
Key Contributions
Future Improvements or Services

Chapter 9– Technical Services

9.1 Acquisitions

Mission and Goal
Staffing
Interrelationships with Other Library/University Departments
Funding and Expenditures
Gifts and Donations
Operations
Projects
Key Challenges
Key Contributions

9.2. Cataloging

History
Mission
Current Operations and Staffing
Global Working Environment/Dependencies/Best Practices

Key Collaborations/Partnerships
Key Challenges
Planning and Assessment Process
Future improvements or services
Key contributions

Chapter 10 – Library Systems

Overview
History
Mission
Staffing (including job descriptions)
Operations
Key Challenges
Key Collaborations
Key Contributions
Planning and Assessment
Future Improvements
Goals
Project Reports

Chapter 11 – Archives

Historical Overview
Mission and Goals
Recent Operational History
Organization
Key Challenges
Key Collaborations
Key Contributions
Future improvements

Chapter 12 – Library as Place

Sense of Place
--Physical
-- Social/Cultural/Learning Space

Addenda

Organizational Chart
Library Goals
Budget Excel Files

CHAPTER 1: Introduction

Submitted by: Shawn Calhoun, Head of Access Services & Tyrone Cannon, Dean of the Library

About the Library

Gleeson Library

Dedicated in December 1950 and named for Fr. Richard A. Gleeson, S.J. (1861-1945), the library was the first new building constructed on USF's campus in 20 years. Gleeson arrived at St. Ignatius College (later the University of San Francisco) in 1882 as a professor of classics, English grammar, arithmetic and penmanship. Best remembered for his tenure as Prefect of St. Ignatius Church from 1918 to 1945, Fr. Gleeson was cited in an article in the San Francisco Chronicle as "the most beloved person" in San Francisco.

The Gleeson Library was a fitting memorial to the father's name, since it, too, has served the University well. The University Librarian, Fr. William Monihan, worked closely with architect Milton T. Pflueger in designing a building that was both large (four floors with approximately 59,000 square feet) and flexible. Their foresight produced a library that answered the University's needs for 45 years. In 1950, the building served 2,000 students; today it accommodates 8,700 students plus faculty, staff, alumni, community members and scholars.

The library's showcase is the Donohue Rare Book Room. Started with a 400-volume collection of works by Sir Thomas More obtained in 1972, the room now houses more than 20,000 items. Among its treasures are a fragment of the Gutenberg Bible dating from the 1450s, medieval illuminated manuscripts, and a collection of letters from the English Catholic novelist and film-writer, Graham Greene. There is a particularly fine selection of first editions by 20th century literary figures and limited editions from California presses.

Currently under the direction of Dean Tyrone H. Cannon, the library's collection is expanding at a rate of some 13,000 volumes per year. Up-to-date technology is added constantly to Gleeson Library to ensure USF students and faculty have a productive space for study, learning and research. The library staff is made up of approximately 90 dedicated librarians, staff, and student workers.

The Geschke Learning Resource Center and The Monihan Atrium

Named in honor of Charles and Nancy Geschke, the 1997 addition to Gleeson Library typifies the renewed spirit of vigor and excitement at the University of San Francisco. The Geschke Learning Resource Center was conceived by Esherick Homsey Dodge and Davis, Bay Area architects who have garnered national acclaim for library design.

The Geschke Center, located in front of the existing Gleeson Library, was the first new building erected on the central campus since 1973. Adding nearly 36,000 square feet to

the University libraries, the Geschke Center provides improved reference and circulation services, better access for disabled patrons and permits the collections to increase in size.

The first floor of the western end of the building houses the library's reference and circulation departments. The periodicals department is on the second floor, and stack areas and the Dean's office suite are on the third. Remodeled areas on the first floor of the existing building include the Thacher Gallery, a study and service area for disabled students and an electronic library instruction classroom.

The Geschkes have been closely connected to USF since their daughter, Kathleen, matriculated here in 1988. Chuck Geschke joined the President's Roundtable in 1989, became Chairman of the Arts and Sciences Advisory Board and was appointed a Trustee in 1991. He is past-Chairman of the USF Board of Trustees. A respected leader in the software industry for more than 25 years, Geschke was president and co-founder of Adobe Systems, Inc. His roots in Jesuit education extend back to 1963-68, when he taught Mathematics at John Carroll University.

The dramatic glass-enclosed atrium that anchors the east end of the Geschke Center honors Fr. William J. Monihan, S.J. The atrium, located at the heart of the lower campus, features 5,000 square feet of open space punctuated by two handsome balconies. The zinc roof echoes the dome of St. Ignatius Church, clearly visible through the faceted glass walls. The Monihan Atrium provides library users with a place for study 24/7 during the academic year as well as a centrally located space for occasional University functions.

Library Vision and Mission Statements

Vision Statement

The University Libraries, as an integral part of intellectual life at the university, provide access to information resources in all formats to advance teaching and research.

The Library Staff at the University of San Francisco are committed to providing excellent, innovative and proactive service to the USF community of scholars, students, and staff and recognize the importance of life-long learning fostered by competence in information and technological literacy.

Mission Statement

The University Libraries lend support to the academic programs by providing the broadest possible array of information resources for instruction and research support. This role is further defined by the expression of specific objectives:

1. Recruit and support professional Librarians to select, care for, service, and interpret the books, electronic resources, government publications, and other research collections necessary to support educating minds and hearts to change the world.

2. Recruit and support a highly competent and diverse Library Staff to provide outstanding customer service and technical/administrative expertise.
3. Provide excellent physical facilities and equipment that will facilitate the use of collections and services.
4. Provide a program of library services, including selected fee-based service to special populations that meet and exceed the requirements and standards of various professional associations and accrediting agencies.
5. Assist faculty, working collaboratively with Librarians, with their varied instructional and research programs and in encouraging students to develop information literacy and life-long learning skills.
6. Develop consortium relationships with local, regional, national, and international academic and research libraries to provide broad resource access to faculty, students, and staff.
7. In a culture of assessment and added value, conduct periodical qualitative and quantitative assessments of library services.

Current Library Goals (see Appendix)

CHAPTER 2: Library Organization, Planning & Assessment

Submitted by: Locke Morrisey, Head of Collections, Reference & Research Services

Governance Structure

The Library Dean is a member of the Provost's Council (which includes Deans of the other Schools on campus) and the President's Leadership Team (which in addition to Deans also has vice-presidents and associate provosts from all areas of campus.) The Library Dean reports directly to the Provost and Academic Vice President. Six department heads (all librarians), report directly to the Dean as does an administrative/budget assistant and the campus archivist. This group of 9 individuals makes up the Library Leadership Team. The 6 departments range in size from 1.0 FTE to over 10.0 FTE. A current library organizational chart is attached as an addendum.

Almost all of the full-time staff in the library belong to one of two unions. All full-time librarians, including department heads, are part of the USF Faculty Association (an AFT affiliated unit). Those in the library assistant ranks are represented by OPE (Office and Professional Employees) union.

The library makes extensive use of student workers to perform such duties as shelving, checkout of materials, data entry, answering basic directional questions, etc. The University has needed to substantially increase student salaries on campus in order to come into compliance with City of San Francisco minimum wage laws. The current budget for hiring student assistants is approximately \$125,000/year.

The library uses part-time positions in only two departments, Access Services, where late night and weekend staffing requires hiring part-time staff and the regional campus libraries which have a part-time librarian and a part-time library assistant.

Planning Process and Strategic Plan

Planning in the library dovetails with overall campus planning. In the early fall, department heads submit to the Dean 3-5 goals with outcomes for the coming year. These goals indicate how they meet one of the campus' current strategic plans. After review by the Dean and the Library Leadership Team the Dean forwards a consolidated set of library goals to the campus Provost. The campus also entertains "special initiatives" late in the fall semester. These are big-ticket items, over \$50,000, that can not be covered by units current budgets. The library has submitted several of these special initiatives and has been successful in being awarded additional funds. Most recently the library was awarded and additional \$50,000 annually for new scientific electronic journals.

Communication

Dean of the Library schedules meetings with the Library Leadership Team twice a month. Library Leadership Team members then disseminate pertinent information from these meeting to their staff. In addition, the Dean schedules a monthly Town Hall meeting that all staff are encouraged to attend. Town Hall meetings typically focus on updating all library staff on major library projects or other library efforts and at times for staff development sessions.

Assessment & Continuous Improvement

Services on campus, including the library, are evaluated by graduating seniors. For the past 18 semesters the library has been the number one rated service on campus by graduating seniors. In May 2007, 80.2 percent of the students surveyed responded that library services were either excellent or good, *the highest approval rating yet recorded.*

LibQual+ User Satisfaction Surveys

To gauge the satisfaction of all library patrons the library has twice participated in the LibQual+ survey process. The library has then addressed some of the participants' comments to create a 24-hour study space and increased access to scholarly journals.

Joint University Library Committee (JULAC)

The Joint University Library Committee (JULAC) is scheduled to meet once a month. This is a committee consisting of faculty, students and a librarian chair. It is a forum to share with faculty and student representatives what is going on in the library, potential changes, collections decisions, a communication mechanism, etc.

Staff Self-reviews and Librarian LCPs

OPE staff go through a six-month and then annual self-review that is then gone over by their supervisor. Every year, the Dean may ask librarians to write a Librarian Career Prospectus (LCP) that consists of a review of the librarian's work and goals/outcomes for the current year.

Recruitment and Retention

The library has been very successful in attracting a well-qualified pool of applicants for librarian positions. Once hired, librarians have a very high retention rate. The turnover for library assistants is much higher as part-time workers seek full-time employment or library assistants gain the MLS/MLIS degree and want to pursue a professional position.

For all positions the library makes every effort to recruit a diverse pool of applicants which is consistent with the University's diversity programs and policies. Librarians are recruited for nationally while library assistant positions are only advertised locally, if at all.

Library staff have many opportunities for professional development and training. The campus has an excellent technology training program that many library staff take advantage of. The library has a staff development committee that looks for opportunities to present videos, web conferences, speakers that would benefit all staff. Staff may also apply for support to attend conferences/workshops. Librarians have a specific pool of money guaranteed by the union contract in which to support professional development. An elected librarian professional development committee reviews all applications and approves use of this fund. The past couple of years librarians have been particularly active such that funding this year was limited to \$2500 for Assistant and Associate Librarians and \$1500 for full Librarians.

Library assistants are hired on a six-month probationary basis. After this time, the staff member is recommended for continuation, termination or extension of the probationary period. Librarians are hired on a two-year probationary basis. After this time, the librarian is recommended for continuation, termination or extension of the probationary period. As librarians progress through the ranks from Assistant to Associate to full Librarian, their files are reviewed by a library peer review committee for recommendation of promotion to the next rank.

A schedule of staff and librarian salaries are submitted as an addendum.

CHAPTER 3 Budget & Expenditures

Submitted by: Carmen Fernandez-Baybay, Assistant to the Dean & Budget Coordinator

Budget : Note that data tables are included in the Appendix

Development

Charles and Nancy Geschke Learning Resource Center, the addition to the Gleeson Library in 1997, was part of the USF's *Building a Bold Tomorrow* capital campaign which made it possible to erect this "first new building on the central campus since 1973." It added nearly 36,000 square feet to the existing library. The University Advancement Division took the lead on the fundraising and development efforts, acknowledging many corporate and foundations, friends and supporters that made the campaign a major success.

The University Library has received the following total donations (endowment and one-time gifts included in the totals):

FY 2004	\$885,011 (total of 50 donors)
FY 2005	\$131,352 (total of 63 donors)
FY 2006	\$630,867 (total of 134 donors)
FY 2007	\$139,423 (total of 61 donors)

All Library endowment funds are applied to restricted accounts that are spent for specific purchases aimed at collection growth, facilities and services upgrade, and/or systems enhancements, only as dictated by the donor's wishes. There are a little over 40 restricted accounts that the Library draws funds from to cover the shortfall in acquisitions or new projects. The Library is able to fill gaps in the collection with new books, electronic resources, videos and periodicals, as needed to support teaching and research objectives.

CHAPTER 4 --Access Services

Submitted by: Shawn Calhoun, Head of Access Services

Historical Context-and Overview

Access Services, as it is currently organized, was formed by the Library Dean in 2004. Before 2004, the department was primarily responsible for circulation, stacks management and course reserves. In 2004, a reorganization of library services added interlibrary lending, physical access control and facilities management to the department. With the reorganization, the department name was changed from Circulation to Access Services. In 2006, Access Services added a part-time Digitization Coordinator position.

The Access Services department has one Associate Librarian/Department Head. Reporting directly to the Associate Librarian / Department Head are 9 staff, of which four are part-time employees. All Access Services staff are members of the Office and Professional Employees Office Professional Employees Union Local 3, AFL-CIO. See the library organizational chart, section XX of this document, for a list of Access Services staff and their primary responsibilities/position titles. The Access Services department has approximately 15-20 part-time student employees during the school year. Staff and student employees work at all hours the library is open to the community.

The Access Services department is staffed 7 days per week at all hours the library is open. Library hours range from approximately 131 per week during the semester to nearly 150 hours during finals. The library operates on an abbreviated schedule during summer and winter intersessions due to reduced instruction and fewer students on campus.

Technology

In addition to a number of departmental webpages and Ignacio, Access services uses the following Innovative Interfaces modules extensively:

- Circulation Desk (patron management, reporting, transaction maintenance etc.)
- Check-in
- Search/Holds
- Renewals
- Notices
- INN-Reach/ILL (Link+)
- Bookings
- Course Reserves

The department continues to use the text-based interface Anzio to Millennium (III) for a limited number of transactions. However, we support eliminating Anzio. The department also makes extensive use of and support the patron “view your library record” function.

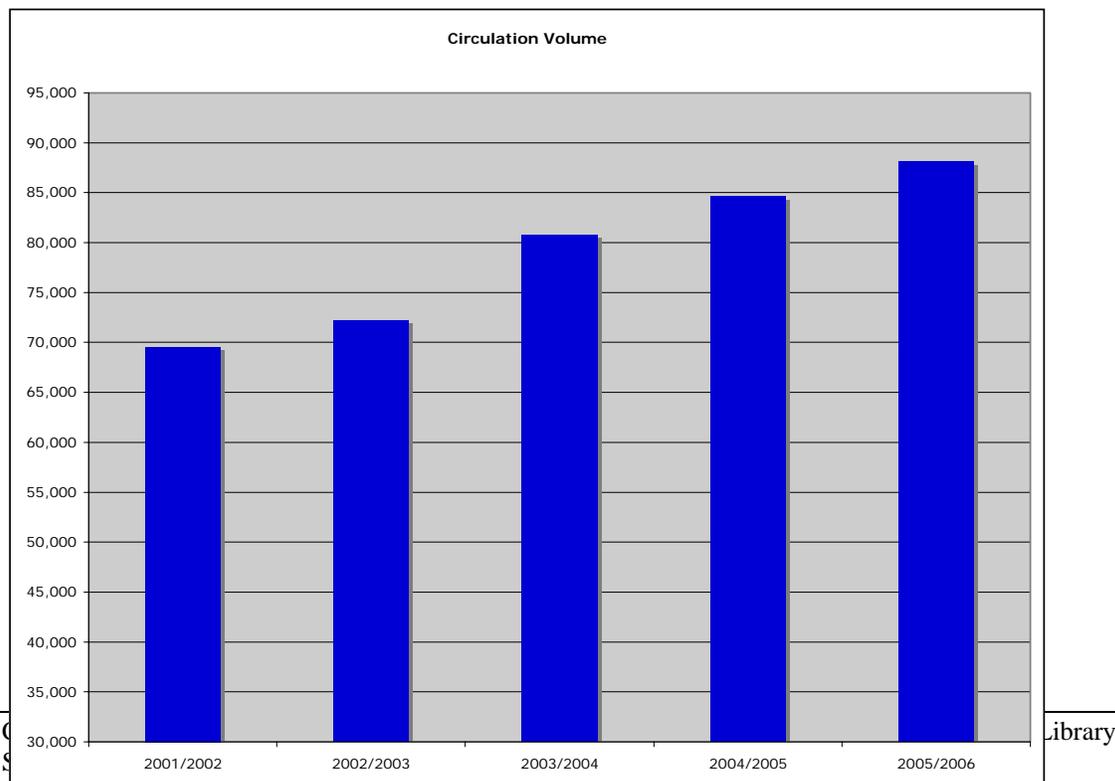
Interlibrary lending relies heavily on OCLC FirstSearch and Ariel for technical assistance, as well as its recently launched process for sending Adobe PDF versions of articles when possible via email to requesters (see Forthcoming Enhancements and Key Challenges section of this document for more on interlibrary lending).

The digitization coordinator uses BookEye™ scanning software/equipment and our digital objects are currently stored on the III server and made accessible through the Ignacio catalog.

Select Data – Access Services

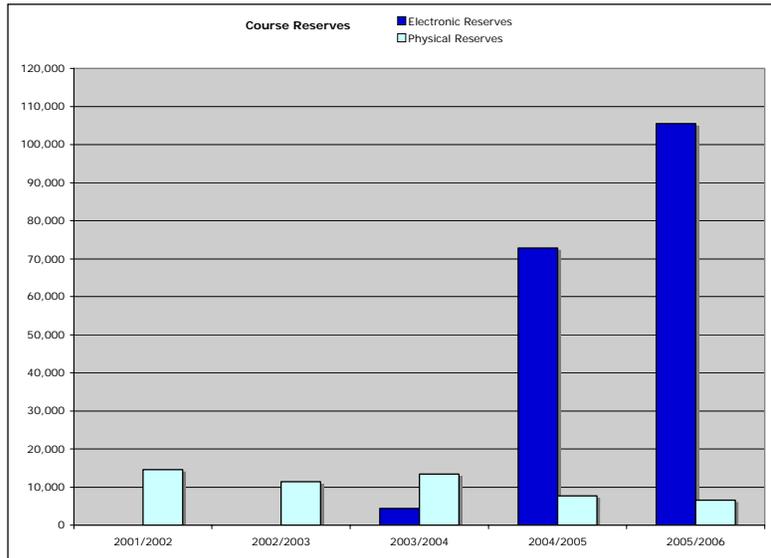
This section includes select departmental statistics. See section XX of this document for a more complete collection of library data. Data in this section are reported in fiscal-year increments.

Circulation Volumes



Course Reserves

Course reserves were primarily a print-based operation before 2004. From 2004 forward, Access Services worked with faculty to increase the number of items on reserve and to offer them as electronic items. The Reserves operation completes the scanning of all items placed on electronic reserve and entering them into the library catalog (Ignacio).

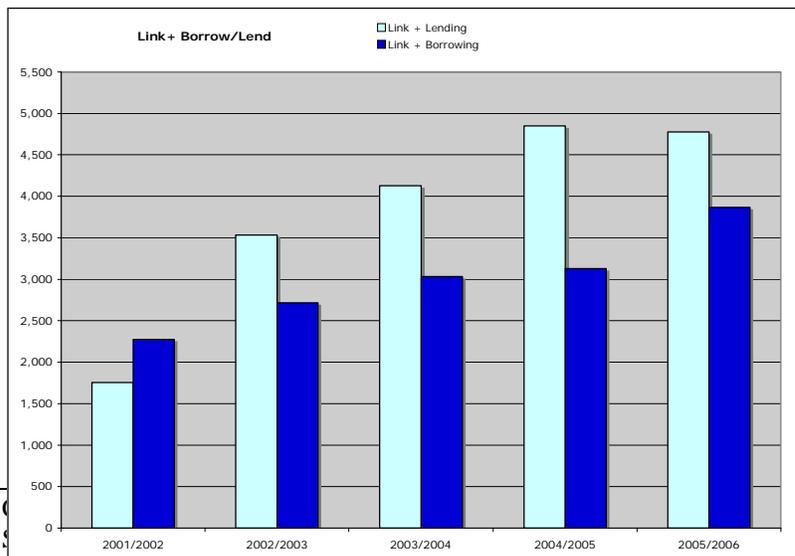


The chart above shows Electronic Reserves reported as web-page views and Physical Reserves reported as items (books, binders etc.) placed on reserve and checked-out by patrons over-the-counter.

Link +

Link+ is a consortium of California and Nevada public and private libraries that share a common catalog facilitating borrowing/lending to/from any of its member’s institutions. In 2003 there were 27 consortium members. This number grew to over 40 participating libraries in 2007.

Link + Borrow represents items that Gleeson acquired for USF students and faculty. Link+ Lend counts are items USF lent to other consortium members.

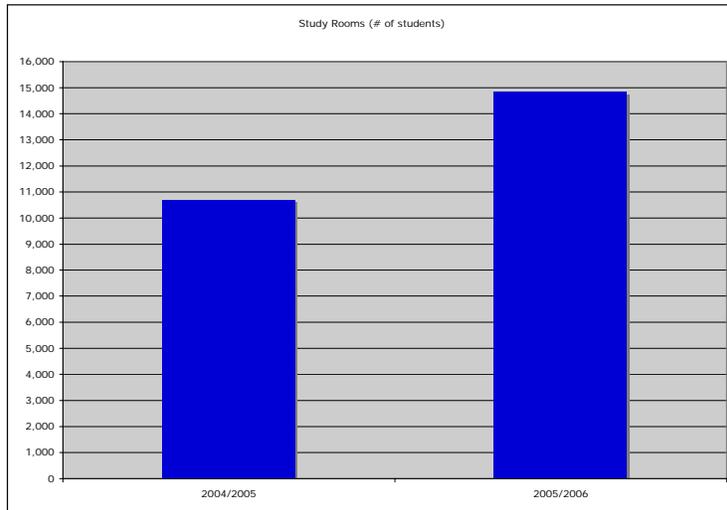


Interlibrary Lending (ILL)

Waiting on data.

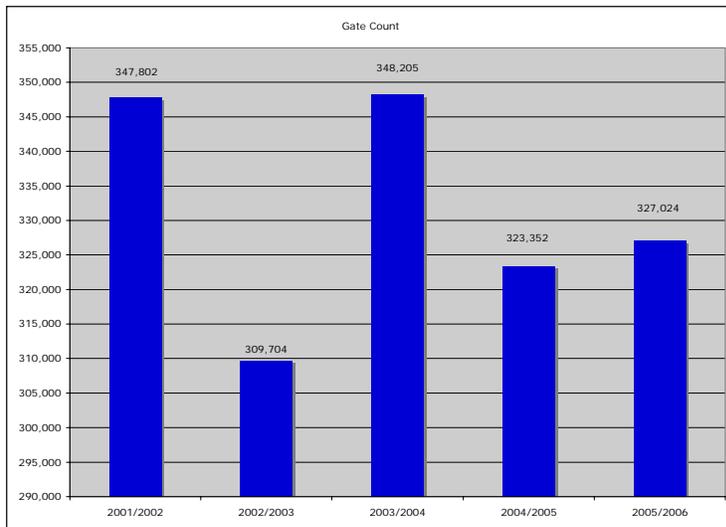
Group Study Room Usage

Access Services began operation of the library group study rooms in fiscal year 2004/5. The following data are self-reported by the users at the time a reservation is made (in person) at the Access Services desk.



Gate Count

Gleeson reports gate count as exits from the main entrance. These data do not include 24/7 library study in the Atrium. Atrium data are outlined below in the Highlights section below.



Volumes Managed – 2004-05 Annual Report totals.

See section XX of this document for additional data regarding the collection. The purpose for including a snapshot of the collection in this section is to illustrate the support Stacks Management provides on a daily basis to library operations.

Book volumes	695,862
Bound periodical volumes	132,316
Audio	445
Video	1,169
Music	121
Other	1,012
Total:	830,925

Square footage (approximate) under management (book/periodicals stacks, public spaces, offices, storage etc.):

Access Services Facilities Management responsibilities can be measured in any number of ways. One simple measurement is to look at the number of square feet belonging to the library.

Gleeson	59,200
Geschke	35,750
Lone Mountain	2,000
Total	96,950

Operations

Highlight current operations, processes and recent enhancements

24-hour Monograph Reshelving

As part of a process redesign during the 2005-2006 academic year, Gleeson eliminated all steps in the monograph reshelving operation between item check-in and the physical reshelving of the book. This included eliminating returned item staging areas, book-cart storage and the 2nd and 3rd floor reshelving areas. The benefits of these changes include:

- All monographs are reshelved within 24 hours of being returned (average > 4 hours)
- Claims-returns were reduced 50%
- Search times for lost items, bills and claims returns reduced over 50%
- No increase in student resources necessary for reshelving

In addition, the integration of these reshelving changes with the stacks management operations has insured that Access Services shelf-reads the entire monograph collection at least once per calendar year and the high-circulation areas approximately once per semester.

Monograph Assessment

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The library is currently working on a deselection project. The primary purpose of this project is to address an impending shortage of shelf space for collection growth. This lack of growth space, if not addressed, would have serious impacts to overall library operations and Access Services' ability to manage the collection, as we are charged to do on an ongoing basis. Access Services supports the deselection project in the following ways:

1. The Access Services Department Head is a Liaison to the School of Education and has liaison responsibility for a majority of the L classification.
2. The Stacks Coordinator will manage the movement of deselected items from the stacks to Technical Services.
3. Once the deselection is complete, the Stacks Coordinator will provide an accurate assessment of the total shelf space available to the library and what percentage is currently utilized.

Digitization, ILL and Link+ Office Enhancements

Access Services supports the libraries digitization initiatives by providing a part time library staff member. The Digitization Coordinator has responsibilities not only for digitization, but also provides support for general Access Services functions. See Forthcoming Enhancements for more information regarding this project.

Gleeson 4th Floor – Academic Departments

A number of academic departments moved into the 4th floor of Gleeson in early 2005. This move closed the 4th floor to USF students and required moving all USF theses and dissertations to the Lower Level of the library. As part of this move, the library discarded all second copies of USF dissertations. Part of the lower level collection (3,800 volumes) was moved to off-site storage (Freemont CA.). Retrieval of these items is accomplished by the vendor and takes approximately 2-3 business days. This floor will be vacated once the Campion renovations are complete and faculty can move into the building. See Forthcoming Enhancements for more information regarding this project.

Highlight any recent/current projects

24-7 Gleeson Library | Geschke Learning Center Atrium Access for Students

In response to feedback from students who completed the LibQual+ (<http://www.libqual.org/>) surveys, the library implemented 24/7 access to the Atrium during the spring 2004 semester. 24/7 access to the Atrium is available during the spring and fall semesters and is limited to registered undergraduate and graduate students. Students have not requested 24/7 access during summer or intersessions. For the period August 2006 through the April 2007 there were 5,513 students who accessed the library atrium after the main building was closed. (OneCard - USF ID data).

Periodicals Shift

Gleeson Library began a shift of bound periodicals in late 2004 and completed the shift in early 2006. This project included moving approximately 6,400 bound volumes to the Lone Mountain Library (closed stacks) and shifting approximately 70,000 bound volumes of periodicals in Gleeson.

Lower Level – Academic Support Services

USF's Academic Support Services moved into the Gleeson library early in 2006. This required a reduction of square footage for USF Archives and a relocation of library services such as ILL processing and mail operations to Access Services. Building alarm systems, access, and elevator services were also affected by these changes to the facility.

LibQual+

LibQual is a web-based survey that helps libraries assess and improve library services. The Access Services Department Head coordinated the implementation of the LibQual+ survey for the library and was completed in 2006. 988 surveys were completed with an overall response rate of 8.22%.

Copyright

The Access Services department head chaired the Gleeson Library Copyright Committee from 2005 until 2006. The committee launched a new library copyright information website (<http://www.usfca.edu/library/copyright/index.html>) in the Spring of 2006.

Student Training

Access Services built a web-based training system for Student employees in 2006 and continues to improve the training system as operational needs change and enhancements/changes are made to departmental processes.

Miscellaneous Enhancements

Over the last three years, Access Services has implemented on-line renewals, email notices (bills, fees, courtesy etc.), Link+ Pickup Anywhere, eliminated library-only access cards (converted to campus OneCards for special borrowers) and other general service enhancements at various points.

Forthcoming Enhancements

E-commerce

Access Services anticipates the addition of III's on-line fee/fine payment solution in the 2007/2008 fiscal year. Currently, patrons can only pay for fees/fines with cash, check or DonsDollars and must do so in person (or mailing checks).

OCLC Illiad

The Illiad product from OCLC (<http://www.oclc.org/illiad/>) will enhance patrons' ability to use and manage their interlibrary loan requests. The product will also enhance staffs' ability to service these requests.

iPod and Laptop Lending

Access Services has a project to collaborate with USF's ITS department to lend laptops to students, which is scheduled to begin Fall 2007 (pilot Summer 2007). The department was approached by a faculty member to pilot an iPod lending project. The dates for the iPod lending project are TBD. Both projects are anticipated to operate using the III course reserves systems/processes.

4th Floor - Gleeson

When the academic departments move out, there will be a project to reconfigure the collections and services that were temporarily relocated to accommodate the closing of the floor.

Digitization and ILL

During the summer of 2007, the library began the process of reconfiguring the ILL, Link+ and Digitization operations to make better use of the spaces each have allocated. This work will conclude this academic year.

Staff Training

Access Services has identified the need to leverage what was developed for student training and use it as a stepping-stone to the development of a web-based training system for new staff.

Key Challenges

Interlibrary Lending – Link+

The Link Plus consortium continues to grow at a rapid pace. In 2003 there were 27 consortium members. This number grew to over 40 participating libraries in 2007. A number of the new members (e.g. Berkeley Public and San Francisco Public) have become large transaction-volume members. While there are clearly advantages to USF borrowers from this service, it also comes with costs. The continued growth of the consortium causes increases in borrowing and lending volumes, requiring additional USF resources to keep pace. While part-time staff support the daily Link+ processing, increased growth in the service may require a reevaluation of how resources are allocated in support of Link+.

Facilities – Space

The library has lost significant amounts of space in the last three years. Examples include:

- Academic courses being taught in the library (3-5 course per semester)
- Faculty offices moving into the 4th floor (temporary, 3+ years)
- Academic Support Services moving into the lower level (permanent)

Other issues affecting space available for students and materials include increased undergraduate admission, the libraries support of supplemental instruction (tutoring) and the traffic associated with having 2 ITS computer labs in the library. In addition to the reduction of space for students in the library, the quality of the space has deteriorated. Finally, to the general issues of deferred maintenance (see below) we have received feedback from students (LibQual+) that there is insufficient quiet study space.

Group Study Rooms

Related to the general issues of decreasing library space, students are making more use of the library group study rooms than ever before (see statistics). Feedback from students (e.g. LibQual+ results) indicates that there are not enough group study rooms available for USF graduates and undergraduates (law school students are not allowed access to Gleeson study rooms). There have also been concerns from students (especially off-campus/non-resident students) with the reservation systems Access Services uses to book study rooms for students.

Facilities – Building Management

Deferred maintenance continues to have a significant negative impact on the overall quality of the facility. Heating and cooling the building, lighting and general maintenance issues which impact the ability for patrons and library staff to fully enjoy the building are a constant challenge. One example of these challenges was the 3 months the library went without an elevator in Gleeson due to the ADA upgrades required when Academic Support Services moved into the lower level.

Course Reserves

There are a number of challenges and opportunities related to course reserves (<http://www.usfca.edu/library/reserveschoice.html>). First, course reserves on-line usage continues to grow (see statistics). Supporting this growth has been challenging because we have not increased the staff assigned to scanning

and placing course reserves on-line. While, we have had increasing success using part-timer employees as support, there is some risk to ongoing operations in that there tends to be higher turnover with part-time staff. Second, the copyright issues related to course reserves remain fluid. One response to the issues related to copyright was the launch of the Gleeson copyright website previously mentioned. Third, BlackBoard™ offers some advantages for faculty over electronic course reserves. However, Access Services remains actively involved with upgrades to BlackBoard and monitors changes in copyright law and practice (the department head is a member of the ACRL Copyright committee). These factors may pose risks we cannot completely foresee to the service as well as opportunities to grow the use of electronic course reserves by the campus community.

Key Collaborations with other departments or units on campus or within the library

Access Services works closely with all of the other departments in the library. These relationships are as varied as the work each department is responsible for and change as the operational needs of the library evolve. Two noteworthy collaborations internal to the library involve OPE staff. Over the past 2 years, part-time staff has worked in both Access Services and Reference. Additionally, the digitization coordinator reports to both the Head of Access Services and the Head of Technical Services, and the staff members' duties are split between both departments.

As Gleeson and the Zief Law library share III (Millennium products, Ignacio, etc.), we work closely with our colleagues at Zief on a regular basis as we consider systems changes and enhancements to our operations.

Access to the library and many of its services requires a OneCard. Access Services maintains a close working relationship with the USF OneCard office. One example is the previously mentioned project to discontinue issuing library (only) borrowing/access cards for special guests (individuals outside the USF community). Access Services now sends all non-affiliated patrons to the OneCard office for their ID card.

Access Services, as the internal department primarily responsible for the facility, maintains a working relationship with USF's Facilities Management and Public Safety departments. Access Services is also the primary facilities liaison for the faculty departments located on the 4th floor and Academic Support Services on the LL.

Gleeson purchased and coordinated installing building-wide wireless access in 2006. The library accommodates two ITS labs in the library and has made arrangements for ITS to offer extended-hours support to students in one of their labs.

Key Contributions to service, learning and scholarship at the University

Access Services interfaces with faculty, students and staff who either visit the library directly or who interface with us electronically through services such as Interlibrary Lending and Course Reserves. Both of these services, along with the traditional circulation and stacks management activities support a wide variety of student and faculty educational and research needs. As the digitization services the library offers continue to expand, this new service will grow into another way Access Services collaborates with USF community members.

Access Services works closely with the Learning and Writing center, which offer a number of academic support programs in the library (e.g. Supplemental Instruction, the Writing Center).

Access Services supports the Jesuit Community library in Loyola Village by providing shelf-reading, weeding and other services as requested.

We anticipate that the libraries digitization initiatives will continue to grow and the part-time digitization coordinator will work more closely with academic departments in the near future.

Planning & Assessment Process

Access Services participates in the library-wide planning process. Reference section XX of this document for the library-wide planning and assessment process.

CHAPTER 5--Reference & Research Services

Submitted by: Locke Morrissey, Head of Collections, Reference & Research Services

Introduction A. Historical Context-Overview:

Since the Gleeson Library opened in 1950, the Reference Department has maintained a reputation for providing excellent service to USF faculty and students. In the 1950's the University offered a Master's degree in School Library Science and much of the work in Reference supported this program. In the early sixties, one of the Reference Librarians applied to the GPO for Government Depository status. This request was granted in 1964 and through numerous inspections, Gleeson Library has maintained a partial depository collection for over 35 years. In 1981, a Reference Librarian with computer systems experience was hired. The first change was to migrate the paper-based Interlibrary Loan process to the OCLC ILL system. Then was introduced a highly successful fee-based computer search service. For the next few years, the department's reputation grew as library-mediated database searching gained favor with the faculty and graduate students. In 1989, Reference took another leap forward by installing one of the first library CD-ROM networks, and soon after adding software-based remote access.

As the technology gained footing, the library instruction program evolved. The Department Head, with training in the dramatic arts, brought to the "library tours" a passion and flair for public speaking that set the tone for new librarians. The introduction of desktop publishing software and personal computers opened up opportunities for the creation of more sophisticated instructional materials, information, and wayfinding graphics for the library as a whole.

Four librarians handled all desk hours (including evenings and weekends), answering complex questions with mainly print resources; performed hundreds of computer searches; managed interlibrary loans; gave instructional sessions; and, in conjunction with the Acquisition Librarian, handled collection development in all subject areas. Everyone worked in an open floor plan, without offices.

After participating in the building design process that began in 1994, the Reference Librarians moved to the Geschke Learning Resource Center in the fall of 1997. The department was renamed the Reference & Research Services department as a new department head arrived. The new room reflected the shift from print to online resources by providing banks of networked computers with printers; a formal Reference Desk was in place; desk hours became scheduled time slots; tours grew into instruction; and most of the Reference Librarians received fully-equipped private offices.

Below is a recent timeline of the Reference & Research Services department

- 1997—Reference department renamed Reference & Research Services department
- 1997—New Government Documents Librarian hired to specialize in Gov Docs
- 1998—Interlibrary Loan position shifted from Librarian to Library Assistant; new position filled.
- 1998—Library Research consultations sessions and email reference began

- 1998—Periodicals / Reference Librarian filled
- 1999—New Reference Librarian position filled
- 1999—New Reference Technology Librarian position filled in-house
- 1999—Electronic Classroom becomes functional
- 2000—Periodicals Department is reorganized with public service functions reporting through Reference & Research Services and technical service functions reporting through Acquisitions
- 2000—The department wins the USF Team Merit Award
- 2002—GoPrint pay for print stations installed in Reference
- 2003—New position of Business Librarian is filled.
- 2004—USF began participating in the Association of Jesuit Colleges and Universities (AJCU) Virtual Reference consortium
- 2004—Interlibrary Loan moved to Access Services
- 2004/2005—Library begins losing space: Most of the Reference Annex collection in the lower level is moved off-site
- 2006—Instant Messaging reference service initiated
- 2006—Library Assistant IV hired to supervise Reference Desk student workers.

B. Organizational Chart (see Appendix)

C. Mission-Statement of Purpose & Goals

Department Mission/Goals are based upon both the library’s mission and goals as well as revised RUSA standards (see Appendix).

D. Statistical Trends

<i>Instruction</i>	<i>2002/2003</i>	<i>2005/2006</i>	<i>2006/2007</i>
Total Classes	237	309	330
Total Students	4,243	5,315	5,693
Research Consultation	173	255	258

<i>Reference Transactions</i>	<i>2002/2003</i>	<i>2005/2006</i>	<i>2006/2007</i>
In Person	9,722	9,043	9,273
By phone	1,112	1,140	1,022
Email Ref	233	287	339
IM	0	90*	220
Totals questions	10,834	10,183	9,842

*(incomplete year)

<i>Reference Books</i>	<i>2002/2003</i>	<i>2005/2006</i>	<i>2006/2007</i>
Volumes added	1501	709	475
Titles added	525	460	385
Volumes moved to stacks	81	121	93
Volumes discarded	94	180	223

Books reshelved	•	1563	1423	1218
Reference Loans	•	12	7	6
	•			
	•			

Operations

Within the last ten years, the department has had some minor reorganization. Current operations and processes are listed below. If the operation has moved out of or into the department, the dates of inclusion are listed. Any recent enhancements, additional services within the past three years, have been indicated with an asterisk (*)

- Interlibrary loan and library proxy training (moved to Access Services in January 2004)
- Periodicals Desk (moved under Reference & Research Services in Spring 2001)
- Government Documents (cataloging of documents moved to Technical services in Spring 1999)
- Librarian mediated database searching
- Reference Desk
- Reference Consultation
- E-mail Reference
- Consortial Virtual Reference*
- Instant Messaging Reference*
- Bibliographic Instruction
- Library user guides/pathfinders
- Student worker training* (A new position was created to handle this. It was taken on by a Library Assistant IV Reference Desk student supervisor in February 2007. Prior to this student training was done by a combination of librarians)
- Departmental intern training (done by department head)
- Collection Development and liaison program (all Gleeson Library/Geschke Center librarians take part in collection development and the library's liaison program beginning January 2000)

Highlights of recent/current projects

- In the Spring of 2006, an instant messaging Reference service was begun. In Spring 2007, a survey was put in place to get feedback from users on the service. The survey indicated that the overwhelming number of users like the service, would use it again and would recommend it to a friend.
- Library Assistant IV Reference Desk student supervisor has begun an extensive review of the print reference collection and is in the process of systematically mending damaged materials.
- In November 2006 Microsoft Office was put on all public reference PCs and Macs in the Reference Room. Prior to this, the only place to create or edit a word Document in the library was in one of the two Information Technology Services (ITS) run computer areas of the library.
- User guides/pathfinders are continually being added and updated. Interns in the department have helped considerably in this area.
- Library Assistant IV Reference Desk student supervisor has developed a thorough student orientation/evaluation program. Prior to this time the training had been done by librarians.

- Department members are interested in more Center for Instruction and Technology (CIT) Training. We have already had one workshop on how to use SurveyMonkey.com. In particular, Library Assistant IV has signed up for a summer CIT Desktop Publishing Certificate program.

Key Challenges

Library liaisons within the Reference & Research Services department work with students and faculty in their respective schools/departments regarding collection development, reference/research assistance and bibliographic instruction. In addition, library liaisons help with general library instruction and reference/research assistance. As a result, some librarians in the department spend a significantly larger percentage of their time trying to meet the aforementioned needs which leaves less time for other expected duties.

From both a collections and a personnel standpoint there is a lack of space in the library. The physical government documents and reference collections are confined to predetermined structurally limited areas so they must be weeded constantly. There is also a lack of teaching space during peak times of the semester. This is exacerbated by increasing requests for instruction and having only one library electronic classroom.

Students will do anything not to use print reference resources. We have tried to expand our electronic holdings for reference materials but inevitably there are resources that are either too expensive electronically or not available at all in a digital format.

Key Collaborations with other departments or units on campus or within the library

Staff in Gleason Library/Geschke Center worked with both ITS and staff in the Zief Law Library to implement a campus-wide pay-for-printing solution that is consistent no matter where you are on campus. After much research, many meetings and presentations, the campus selected GoPrint Systems Inc. to handle pay-for-printing

Technology problems both within the library as well as problems with remote access are mitigated through the cooperative efforts of the Reference & Research Services, Library Systems department and ITS.

Library liaisons within the Reference & Research Services department work with the Access Services and Acquisitions department to inform faculty of such services as Interlibrary Loan, Library proxies, class reserves and purchasing of library materials. They work with the Head of the Rare Book Room when library instruction warrants use of the materials in that collection.

The Electronic Resources Librarian, Reference Technology Librarian and other departmental staff work with the Head of Systems to help test and implement the library's link resolver, WebBridge and federated search product, Metafind. Department members are currently working with the Head of Systems in the design and implementation of Innovative Interfaces new product, Encore.

Key Contributions to service, learning and scholarship at the University

- Librarians serve along side faculty and administrators on University of San Francisco Faculty Association (USFFA) committees, e.g., Academic Honesty, Planning & Budget, etc.
- Librarians and support staff serve on library search committees.
- Librarians provide subject specific instruction for professors and/or students in both a classroom setting as well as one-one-one.
- Librarians and support staff regularly work on displays within the library to inform patrons and encourage more use of the collection.
- Librarians have created Web resource pages to point students and faculty to resources or finding aids in their particular disciplines.
- Librarians are very active professionally and have served in many leadership roles both in local as well as national associations.
- Librarians have been awarded research leave where they are given up to seven weeks off during a year to work on a research project. They then present the results of their research to all library staff at future venues such as Town Hall meetings.

Planning & Assessment Process

Within the department, the previous year's strategic goals and priorities are evaluated each May. One to two meetings are spent in mid-June through early July to help formulate current year's strategic goals and priorities. These are then submitted to the Dean of the Library along with other department strategic goals and priorities where the Library Leadership Team (LLT) will help determine the library's overall strategic goals and priorities for the current year. In addition, each fall the campus has a call for special initiatives where the library or a library department can submit a special funding request for new materials, services, etc.

Future improvements or services

The department has plans for a few equipment upgrades such as making sure all new printers have the capability of double-sided printing and having a color printer for departmental use. Ideally, it would be nice to have a scanner in the library for student use and to update other types of traditional technology with new technology, e.g. upgrade technology for microfiche and microfilm scanning and printing: get two of the new scanners that can be connected to computers so patrons can scan and e-mail to themselves or send to a print station. It would also be nice to have additional technology at the point-of-need, e.g., enhance access to research databases by adding one more public workstation in Periodicals and changing the two Ignacio stations by the elevator to be fully accessible to the web/all library resources (i.e. changed to LAN login) and networked to the Periodicals GoPrint station.

Half the librarians in the department participate in the AJCU Virtual Reference project or are familiar with the software. All librarians should be trained to use the service and eventually participate on a rotational basis.

Librarians are looking at new ways and new technologies to help patrons make the most out of our library resources. This involves creating more online tutorials or using podcasts or streaming videos to provide orientation and instruction.

At least two members of the department are interested in creating a library newsletter. There is support for this amongst LLT members especially by the Dean.

Members of the department would like to see more disabled access throughout the library but mainly in the Reference area, e.g., workstations with software, adjustable height tables, dedicated wheelchair workstation, etc. The assistive technology room should be made more accessible, e.g., move lab computers away from door, enlarge doorway, and add automatic doors for the room and the door from the hallway.

CHAPTER 6--Distance Learning Services

Submitted by: Vicki Rosen, Head of Distance Learning Services

Introduction

Overview

Library resources and services in institutions of higher education must meet the needs of all their faculty, students, and academic support personnel, regardless of where they are located. Distance learning library services support university courses and programs offered away from a main campus or in the absence of a traditional campus. These courses may be taught in traditional or nontraditional formats or media, may or may not require physical facilities, and may or may not involve live interaction of teachers and students. The phrase is inclusive of courses in all post-secondary programs designated as extension, extended, off-campus, extended campus, distance, distributed, open, flexible, virtual, synchronous, or asynchronous.

Special funding arrangements, proactive planning, and promotion are necessary to deliver equivalent library service and to achieve equivalent results in teaching and learning. Because students and faculty in distance learning programs frequently do not have direct access to a full range of library services and materials, equitable distance learning library services are more personalized than might be expected on campus. Innovative approaches to the design and evaluation of special procedures or systems to meet the needs of the distance learning communities is encouraged. -- *ACRL Guidelines for Distance Learning Library Services, 2004*

According to WASC, an *off-campus site* is defined as a location 25 miles or more from the home campus, where 50% or more of a degree program is offered. *Distance Education programs* are those where 50% or more of the degree program offered by the institution is mediated by the internet or other technology. A *blended program* is a combination of off-campus and distance education and the model used at USF.

USF has four regional campuses, three in the greater San Francisco metropolitan area and one in Sacramento. They focus on offering evening programs for working adults, leading to a bachelor's or master's degree in a variety of disciplines from the College of Professional Studies, School of Education and, in fall 2007, the School of Nursing. Each regional campus has its own regional library, with appropriate staff, collections and equipment. In addition to the northern California regional campuses, the Distance Learning Services Department also serves students in the Orange campus' Master of Sport Management program.

None of the programs is offered entirely online, and most of the classes are held in a traditional classroom setting. However, many of the courses include an online component, and a few courses are offered completely online.

The service model can be considered "high tech/high touch". Working adults in the cohort model with 7-8 week classes, who more than often have been away from the academic environment for several years, need extra attention from library professionals. They also need as many resources and services online as possible. And to supplement the online resources, the department's Document Delivery Office supplies over 3,000 books and articles annually to distance learning students and faculty.

History

The Off-Campus Services office was established in September 1988 in response to WASC recommendations to serve students in graduate programs in Nursing and the School of Education, and students in undergraduate and graduate programs in the College of Professional Studies, who took classes throughout California, from Napa to Orange. A Coordinator Librarian and Document Delivery Assistant were hired. New student orientations to library services for CPS students began in 1989 and continue to the present in an expanded format. In 1991 the first USF regional campus was established in San Ramon, complete with an onsite library (as stipulated in the WASC standards), with a print collection and several computers and staffed by a .53 professional librarian. In 1992 the Central Valley Regional Center opened and was followed by the Cupertino Regional Campus in 1994. Libraries with librarians were included in each site. The Central Valley Center became the Sacramento Regional Campus, which moved twice before settling in its present location. The North Bay Regional Campus was established in 1997 with the library model included. By this time, .53 library assistants had been added to the staff on each campus.

Outside the Bay Area, CPS taught undergraduates and graduates at a site in Orange California until 1999. At that time the Sport Management graduate degree program began in Orange where it continues today. The Theology department also had a graduate program at the Kino Institute in Phoenix that continued until 2004. The Coordinator (later Department Head) traveled to these sites to meet students, staff and faculty and teach introductory sessions in library services and research methods. The Orange campus is still visited each year.

The Coordinator position transitioned to Department Head in the late 1990's and the department was renamed Distance Learning Services to reflect the technological changes in the delivery of teaching and services. In 2000 the Oakland Regional Campus was the last campus to be added, complete with library and library staff, but was unable to survive the economic downturn and closed five years later. Throughout these changes, library service to the students and faculty kept pace with the demands of the various curriculums and with the rapid transformation of delivery methods for materials and instruction, embracing both the physical and the virtual library.

Mission

The members of the Distance Learning Services Department strive:

- to advocate for the distance learning community in planning for and delivering library and campus-wide services;
- to meet the information and research needs of students and faculty who attend or teach USF classes at a distance from the San Francisco campus;
- to recognize the unique characteristics of the non-traditional adult student population who are the primary distance learning student population
- and to understand, promote, and use technologically progressive methods for content delivery and communication with librarians, students, faculty, and staff.

Operations

Management & Staffing

Gleeson Library | Geschke Center San Francisco campus

The *Head of Distance Learning Services and Regional Libraries* is ranked as a Librarian and is a member of the USF Faculty Association. She reports to the Library Dean; is a member of the Library Leadership Team; manages the budget, planning and administration of the department and the regional libraries; and supervises the members of the department. She maintains her office in the Gleeson Library | Geschke Center.

⋮

The *Distance Learning Services Operations Coordinator* is ranked as a Library Assistant V and is a member of the OPE, Organization of Professional Employees. He reports to the Department Head and maintains his office in the Gleeson Library | Geschke Center. He manages the Document Delivery Service, which includes research assistance, with the help of one part-time student employee. In addition, he handles all the general operations for the department.

Regional Campuses

Sacramento, Cupertino, and San Ramon Each campus has one .53 FTE Associate Librarian, classified as exempt administrative staff, who receives prorated full benefits. Each librarian supervises one .53 FTE Library Assistant, classified as non-exempt staff, who also receives prorated full benefits.

North Bay This campus has one .75 FTE Associate Librarian, classified as exempt administrative staff, who receives prorated full benefits.

Managing part-time exempt and administrative personnel presents unique challenges not found in other library departments. Negotiations with the Human Resources Department over the years has allowed these employees to receive full benefits, including medical coverage. Because the regional librarians are not members of the USF Faculty Association, they do not have the same step and promotion scale that full time librarians have as tenure-track librarians. They do not receive tuition remission, and their professional development funds are part of the regional library campus budgets, rather than through applications for funds through the Faculty Development monies available to USFFA members. The Library Assistants have access to the budgeted funds, as well as to the Staff Development Funds set aside by the Library Dean. The Regional Librarians and Library Assistants receive cost of living and merit increases annually, as determined by the Library Dean. Because the pool varies year to year, the salary parities with the full time librarians and library assistants tend to erode over time. Periodic adjustments are necessary to realign the salaries with their full time equivalents.

Financial Support

The university provides continuing financial support for the library needs of the distance learning community. The budget is allocated on a schedule matching the overall institution's budgeting cycle and is designated and specifically identified within the overall library budget to support the four regions and the home base operations. These funds are sufficient to cover the type and number of services provided to the distance learning community and to support innovative approaches to reaching the distance learning community staff, faculty and students.

Facilities

Regional Campus Libraries

USF uses a distributed approach to providing distance library services. The four regional campuses lease suites of rooms in commercial office facilities. Each regional campus has its own library, with appropriate staff, collections, equipment, and communication networks in sufficient size for the number of students served. The libraries occupy large rooms within the office suite. In some cases, there is an adjacent smaller office for the Regional Librarian. Each library reflects the unique atmosphere of its campus, and varies somewhat in square footage and furnishings. The library interiors are designed and furnished by the department head and each regional librarian.

Photocopiers, which operate via debit cards or cash, are on each campus. The regional library also serves as the campus computer lab, with the computers connected to USF's wide-area network via a shared T-1 line that is leased from Pacific Bell. This provides a very fast connection to the main campus computer networks and the Internet. Each of the regional libraries has between six and nine IBM desktop computers with 14-inch flat-panel monitors. The systems run Windows XP and are replaced every four years. Additional equipment includes LCD projectors, networked laser printers, color

printers, and scanners. USF's Information Technology Services Department maintains the computers, wide-area network connections, and telephone systems for the regional campus offices, libraries, and classrooms.

Because the regional campuses specialize in evening and Saturday programs for working adults, the libraries are staffed on weekday evenings and Saturdays. The regional campus office staff opens the library for students at times when it is not staffed, allowing students and faculty access to the library's resources whenever they are on campus.

Orange Site

The Sport Management graduate program in Orange California is supported by the Distance Learning Services Department without a physical library presence. In collaboration with the faculty, the librarian purchases a small selection of general and sports marketing reference works, in addition to relevant trade publications. These are housed in the USF office suite at the Sisters of St. Joseph complex, where classes are taught and student, faculty and administrators meet.

Document Delivery Office

The Gleeson Library | Geschke Center houses the Document Delivery operations in a large room with computers and equipment for copying, scanning, faxing, and packaging. In addition, the office serves as the staging area for books and media ordered, processed and delivered to the four regional campus libraries. Also housed here are the department archives and files for personnel, reports, order histories, and other documents related to operations.

Resources

The regional libraries have physical and electronic access to materials that meet the students' needs in fulfilling course assignments; enrich the academic programs; meet the teaching needs; and, to the extent possible, facilitate the acquisition of lifelong learning skills. Students on the Orange campus have access to physical materials through the document delivery service, as well as online access to the electronic resources.

Regional Library Collections & Reserves

Each of the regional libraries has a small collection of reference and circulating books, journals and magazines, and instructional VHS videos and DVDs. The book collections are selected by the Regional Librarians, through a cooperative ordering process. In some cases, recommendations are made by teaching faculty or subject specialists from Gleeson Library | Geschke Center. Processing and cataloging are done at Gleeson Library | Geschke Center and the books are listed in Ignacio, the USF library's online catalog. Each regional library collection is slightly different from the others, reflecting the courses offered at that regional campus.

The collection development process generally begins on a wiki, with one librarian filling in a template with requests for the others to review. Using USF credit cards and an Amazon corporate account, each librarian orders and pays for books or videos. These are delivered to Gleeson | Geschke for processing by the Document Delivery Office and Cataloging. When ready, the materials are shipped via UPS to each library.

Each of the regional campus libraries maintains a small collection of reserve books that are used by the courses on that campus. In addition, Gleeson Library | Geschke Center offers online reserves for classes at the main and regional campuses.

Regional Library Software

The regional campus library computers use a variation of the University's standard software image, which is specially configured to allow seamless access to the library's databases and other online resources. Applications include Internet Explorer, Netscape, Microsoft Word, PowerPoint, Excel, Microsoft Access, Microsoft Project, Adobe Acrobat, Photoshop Elements, and a number of K-12 educational software packages that are primarily used by the education students.

Online Databases / Ebooks/ Electronic Journals

USF provides remote access to about 90 online bibliographic databases, over 2,000 ebooks from *ebrary* and *netLibrary*, electronic reference works, and electronic journals. These are essential to regional and distance students and faculty who need quick access to research materials from their desktops. There is a standard navigation menu that appears on the library homepage and each page of the website. One of its items is a link for Regional and Distance Services that goes to the Distance and Regional Services homepage, which has links for Document Delivery and the regional campus libraries. The Document Delivery webpage has information about the service and links to the online forms used to order materials and print a pre-paid return label. Each of the regional campus libraries has its own small website, with information such as library hours, library policies, and research tips.

One of the most useful features of the website is a series of pages listing appropriate resources for researching various subject areas. These include links to specific databases and online instructional materials. The regional librarians have created pages for students who are enrolled in a College of Professional Studies program. They can click “Start Your Research/College of Professional Studies/[the name of their program]” and come to a page that lists specific databases and other resources that are especially useful for this program’s assignments.

Services

Reference assistance/Consultation services

Reference assistance is provided for USF’s regional campus and distance learning community in several ways:

In-person: by the Regional Librarians and Regional Library Assistants at their campus libraries.

By telephone: The Regional Librarians and Regional Library Assistants provide telephone reference service during their regular hours, which are afternoons, evenings and Saturdays. Students and faculty also may call the Reference Desk at Gleeson Library Geschke Center or the Document Delivery Office toll-free number for assistance.

By email: All of the Regional Librarians and Regional Library Assistants use email, and generally encourage students to email them with questions. There is also a form for email reference service on the Gleeson Library | Geschke Center website and they may contact the Document Delivery Office via *regional@usfca.edu*.

By instant messaging: The Gleeson Library | Geschke Center Reference Desk librarians answer IM questions whenever the desk is open.

By the online Ask A Librarian service; USF participates in a collaborative online reference service through the Association of Jesuit Colleges and Universities. This provides 24x7 live contacts with a librarian, either from one of the AJCU colleges or from Tutor.com. One of the Regional Librarians participates in this service.

Instruction

Classes at the regional campuses use the cohort model, where each student is assigned to a specific group that takes a set program of courses together. The Regional Campus Librarians, and occasionally the Regional Library Assistants, regularly meet with each cohort to introduce students to the library resources and to teach them how to conduct online research. Instruction is in the classroom, using a computer and LCD projector. The number and content of the sessions varies according to the Regional Librarian’s perception of each cohort’s needs. The Department Head travels to the Orange campus each July to introduce the new Sport Management students to the library resources and services.

Circulation

Ignacio, the library's online catalog, indexes the regional libraries' holdings. All the libraries use online circulation system books they have out, renew those books online, and call up the record for a regional campus book and see whether it is currently checked out.

Regional campus students use their University Identification Card as their library card. They may renew their books either in-person at the regional campus library or online through Ignacio. At present, there are no overdue fines charged for regional campus books, but books that are long overdue are subject to a stiff replacement fee.

Document Delivery/ Interlibrary Loan/ Link+ Pick up Anywhere

The Distance Learning Services Operations Coordinator administers the Regional Document Delivery Service. It is available only to regional campus and students in the Orange campus program.

Regional campus students may have books or journal articles from Gleeson Library | Geschke Center shipped to their home at no charge. They order the materials by completing a form on the Distance Services website. Books are shipped by Priority Mail or UPS. Articles are emailed in PDF format, faxed, or mailed by first-class mail. An innovative pre-paid return program through USPS allows them to mail books back at no charge.

The Document Delivery Service obtains books and articles from other libraries for regional campus students, under the same conditions described above. There is no charge for the service. If no free source can be found any interlibrary loan fees charged by other libraries are the responsibility of the student. The student is always consulted before the Service places a loan that requires fees.

Regional campus students may also obtain books from San Francisco area libraries via the free cooperative Link+ interlibrary loan service. A link to this service appears on the record for each item in the Ignacio online catalog. Link+ books may be picked up at a number of public and academic libraries throughout the state.

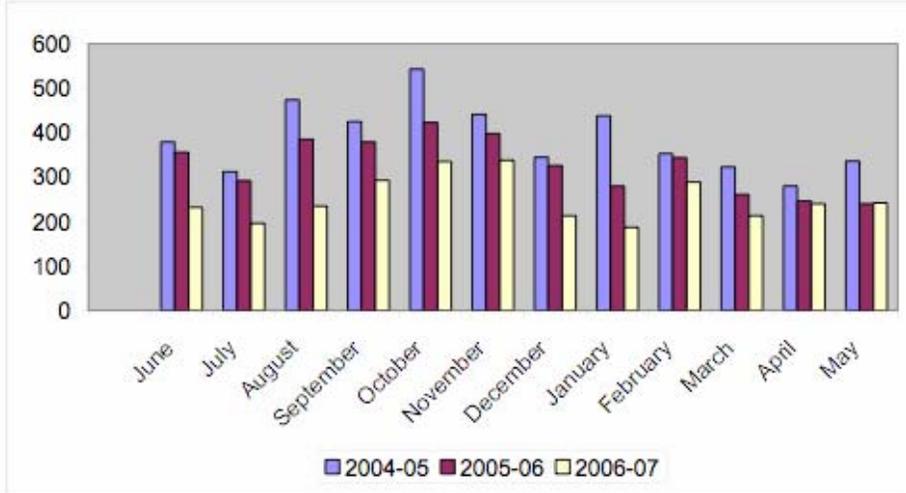
Administration

Administrative tasks include budgeting, tracking all orders and purchases, resolving scheduling issues, codifying staff policies and practices, resolving conflict, training librarians and library assistants, disseminating library and university information, purchasing software and peripherals, purchasing furnishing, etc.

Selected Document Delivery Statistics see next page

**Distance Learning Services - Document Delivery Totals
2004-2007 Filled In House and ILL Books & Articles**

3 year Total # Document Delivery Requests Filled by Month

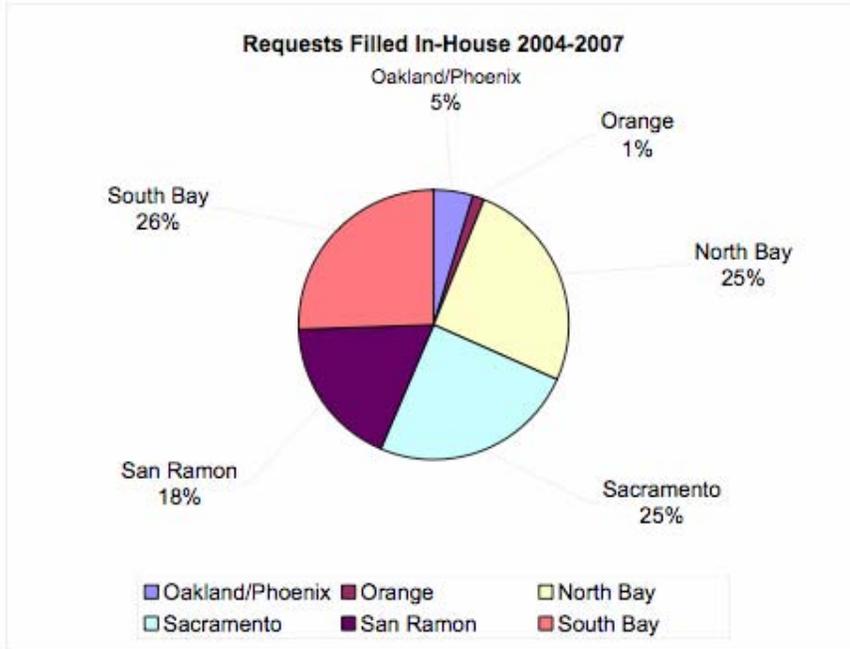


Month	2004-05	2005-06	2006-07	Total
June	379	356	232	967
July	312	292	196	800
August	474	385	235	1,094
September	425	379	293	1,097
October	543	423	335	1,301
November	441	398	338	1,177
December	345	326	213	884
January	438	280	187	905
February	353	344	289	986
March	323	261	213	797
April	280	246	240	766
May	336	240	242	818
Total	4,649	3,930	3,013	11,592

Total Filled In-house	9,374
Total Filled through ILL	2,218
Total Filled 2004-07	11,592

Distance Learning Services
Document Delivery 2004-2007
Books & Articles

Requests Filled In-house - % per Region



Total Document Delivery Requests Filled by Region

Location	2004-05	2005-06	2006-07	3 Yr. Total
Oakland/Phoenix	441	N/A	N/A	441
Orange	52	51	18	121
North Bay	940	833	629	2,402
Sacramento	864	797	649	2,310
San Ramon	649	603	448	1,700
South Bay	972	840	588	2,400
Total # =	3,918	3,124	2,332	9,374

Recent/Current Projects/Recent Enhancements

Standardizing as many operations in as many ways possible has been the goal of the department for the past several years, as it has been for the regional campuses and university as a whole.

In terms of technology, the collaboration with ITS is on the library computer image, hardware, software, equipment, and usage and support policies.

For the students, there has been a complete migration to online circulation at each campus; the creation of instructional podcasts; and the very successful online “pre-paid return” service. More podcasts are in development as USF begins goes live with iTunes U.

For the department administration the goal has been to move from centralized to distributed workloads. Decision-making for collection development shifted to the librarians at each region as did the purchasing, enabled by a combination of the USF purchasing cards, online payment tracking system and Amazon corporate accounts. Policies and practices are moving to a wiki so the current information is always available and easy to update. The North Bay Librarian, who works 32 hours per week, is taking on more responsibilities as the “coordinator” of regional library policies and her role will develop over time as she sees how much she can fit into her schedule.

The School of Nursing is bringing a new Masters degree program to the San Ramon campus in Fall 2007, and then to the Santa Rosa campus in Fall 2008. The regional librarians are training with the Gleeson | Geschke nursing liaison to develop expertise in nursing research. Online collections are growing to further support nursing research for all students.

The most recent enhancement to the regional campuses is on the Cupertino campus, where a new security system allows library staff to see live video of the buildings entrance and hallways thanks to efforts by the Senior Director of Regional Campuses and the Cupertino Campus Director. Security at the remaining campuses is under review. This will benefit all the regional library staff.

The Document Delivery Office is undergoing redesign as it reverts back from a dual ILL-DLS Office to one dedicated to DLS functions only. This will improve workflow and communication between the Coordinator, the student worker, and other staff members.

Key Challenges

Enrollments The librarians must respond quickly to changes in program offerings because of market demands. Collections need to be added or subtracted on short notice, and the librarians and library assistants may need training in new disciplines, such as project management and nursing to serve students and faculty. Campuses can open and close; or a campus can switch from one school to another (i.e. College of Professional Studies to Arts & Sciences). Final program offerings are often not known until the start of classes. Staying current with these changes is a challenge for the Department Head and the Regional Librarians. Working closely with the Senior Director of Regional Campuses, a recently created position, helps the Department Head stay better informed.

Audience The regional campus students, faculty and staff have a wide range of computer capabilities. Regional campus student are typically women, or less frequently men, in their thirties or forties who have been out of school for several years and wish to pursue a new career or advance in their current career. Many of them tend to have only the most basic knowledge of how to operate a computer. Others, particularly the Information Science students and faculty, have a great deal of knowledge regarding certain aspects of using technology. However, even those who consider themselves computer experts are often quite unsophisticated when it comes to online searching and selecting appropriate information sources for college assignments.

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Management For the Department Head, managing at a distance presents challenges, such as labor relations with non-unionized staff (issues of parity with full time librarians and library assistants, promotions, benefits, supervisory issues) and finding time to travel to the campuses while maintaining a full schedule on campus.

Isolation The Regional Librarians operate as sole practitioners on each of their campuses. They miss the camaraderie and shared learning experiences enjoyed for the Gleeson/Geschke librarians. When there are professional accomplishments, there is no librarian colleague on hand to appreciate these. Attending meetings and trainings on the main campus speeds learning. While the department strives to exploit online communication techniques, the collaboration with other librarians on projects and being able to discuss issues, procedures, and policies is still best done face to face. The department head splits her time between Reference and DLS so that scheduling visits to the regional campuses in the late afternoons and evenings becomes a challenge.

Because the libraries are under one dean, the regional campuses under another dean, and the Information Technology staff split between ITS and the Campus Directors, it is challenging to feel a part of the library or the campus. When issues arise they must handle them as best they can without someone on site to advise them.

Computer Support ITS employs a full-time Regional Support Technician who travels between the regional campuses to provide hardware and software support for the administrative offices, classroom technology and the libraries. He also designs the software image for the libraries that must include all software requirements from CPS and SOE. Each campus also has a part-time Technical Support Assistant who reports to both ITS and the Campus Director, and is there in the evenings and on Saturdays to provide expert computer assistance for the students and faculty. This person assists with the use of computer projectors, VCRs, DVD players, and other classroom technology and trains with the Regional Technician to assist with his work. At other times, computer support is provided by the Instructional Technology Services Help Desk, which can be reached by email or phone from 8am to 8pm Monday through Friday. The Regional Librarians and Regional Library Assistants provide first-level support with simple computer problems but are encouraged to defer to ITS in following their service protocols. The support process is constantly evolving as the hardware, software, and peripherals change. While ITS does an exceptional job in keeping everything running, problems do occur that can take a long while to resolve. Adhering to a firm schedule of software requests from the schools and colleges can help. Having the onsite Regional Technician report directly to ITS could also help streamline the workflow.

Multitasking The Regional Library staff represents the University in the evenings and weekends on their campus and are often put in the position of handling requests and emergencies that are outside the normal library duties. Although each position is part-time, the staff is required to evaluate and master the same rapidly changing databases, online resources and procedures as their full time equivalents. The Department Head participates in the life of the Gleeson | Geschke as Reference Librarian (desk hours, teaching assignments and individual research appointments), CPS and Visual & Performing Arts liaison, and the CPS San Francisco campus librarian.

Advocacy Ensuring university and library policymakers and practitioners understand and respond to the needs of non-traditional students, faculty, and administrators is a constant, but rewarding, challenge.

Distance Learning at USF While USF is not yet embracing online programs, there is online coursework. It is important for the Department Head to stay current with distance learning practices and educational technology in order to support distance learning and contribute to the learning environment. Networking with educational technology colleagues and adult education practitioners at USF and through the AJCU conferences helps with this challenge.

Key Collaborations

Gleeson Library | Geschke Center Because the regional libraries function almost as separate branch libraries, their management parallels many of the functions of the Gleeson Library | Geschke Center. The department head monitors the five budgets with the Dean's Budget Coordinator and budget and personnel issues are reviewed with

the Coordinator and the Dean. Much of the work of the department involves purchases - from furniture to DVDs. While most items are ordered directly from vendors, some, such as standing orders, come through Acquisitions. Collection development selections made by the regional librarians are also added to the Gleeson | Geschke collection by the Operations Coordinator. Books and media are sent to Cataloging to be added to Ignacio and processed. Discard lists also go to Cataloging after each region's annual weeding project.

Reference & Research Services includes members of the DLS department in their weekly meetings, in reviewing and recommending databases; in database training sessions; in web page design; and in any of a variety of other issues that can impact the online and regional users. Regional librarians participate in virtual reference shifts and design instructional materials for databases and subject specialties.

Systems and DLS collaborate on authentication issues, online circulation matters, and other III products. Access Services interfaces with DLS for CPS Reserve items, some Circulation issues (student holds; adjunct faculty access) and the DLS Operations Coordinator works closely with Interlibrary Loan/Link+ on training issues and work refinements.

Academic & Enrollment Services The department head works closely with the Senior Director of Regional Campuses, the individual Regional Campus Directors and their staff to stay current with the use of the regional facilities and how changing policies, practices, programs, enrollments and staffing impact the libraries and library staff. In the same way, changes in library policies, practices and staffing can impact the regional campuses. Much depends on keeping communication channels open and having frequent updates. The new Senior Director is very valuable in this regard.

Schools & Colleges College of Professional Studies and the School of Education administrators, staff and faculty communicate updates and requests for information and services for their students and faculty, especially the adjuncts. The CPS new students' orientations in the spring and fall include presentations by the department head. The School of Nursing is beginning classes in the regions and working with the DLS department to ensure resources and expertise are available. The regional library staff is especially helpful to faculty and students who may need extra attention navigating university procedures. The libraries also represent a link to the university culture for faculty and students who rarely come to San Francisco.

Information Technology Services The ITS Desktop Support Manager is invaluable to the regional library operations. The department head works almost daily with the Regional Support Technician monitoring the state of the hardware, software, printers, and other peripherals in each regional library. He in turn works with each region's support technician to keep the library and classroom technology functioning smoothly. In addition, members of Communications & Networking Services and Enterprise Systems & Applications will work with the department head or library staff for particular infrastructure projects and changes. The department head is a member of the Learning Technologies Subcommittee of the University Information Technology Committee. This subcommittee oversees the maintenance and development of USF's technical resources in direct support of teaching and learning, including Blackboard, classroom technology, distance learning, and emerging technologies.

Business & Finance Human Resources collaborates with the department on personnel, payroll and benefits issues. Purchasing handles furniture and equipment acquisitions. Each regional librarian, the Operations Coordinator and the department head have USF Purchasing credit cards that can be used for both travel and materials expenditures. The department follows the university protocols in tracking and verifying all credit card expenses and all travel and other miscellaneous reimbursed expenses.

AJCU, the Association of Jesuit College & Universities The department head is a member of DACE, the Deans of Adult and Continuing Education, which meets twice yearly to discuss relevant issues; and is also a member of CTTL, the Conference on Technology Teaching & Learning, which meets yearly in conjunction with the CITM, the Conference of Information Technologies Management, to share current practices and concerns across Jesuit institutions of higher learning in the U.S. and Latin America.

Key Contributions at the University

Service The members of the Distance Learning Services department are attuned to the role library services, complete with professional staff and physical libraries, play in recruiting and retaining non-traditional adult students to programs in the regions. The department members advocate for the adult students and their faculty in planning for and delivering library and campus-wide services. The department members consistently deliver a high level of service and understand the marketing advantage that excellent customer service brings to the University.

Learning The department members work to understand, design and promote technologically progressive methods for content delivery and communication to benefit teaching and learning. The librarians and library assistants teach information literacy skills, support scholarly work of students and faculty and promote lifelong learning.

Planning Process

Strategic Goals/ Annual reports Each year, the Head of Distance and Regional Services prepares an annual report on the state of the department, which is submitted to the Library Dean. Each of the regional librarians prepares a similar report about her campus, which is submitted to the Head of Distance and Regional Services. These include a summary of the previous academic year's accomplishments and challenges; personnel changes; statistics on regional library collections and services; expenditures for collections; statistics on document delivery; analysis of the previous year's goals; and a set of goals and objectives for the coming academic year. A separate report of departmental strategic goals is prepared for the Library Dean, to be consolidated into library-wide goals.

Performance appraisals Yearly reviews with all department members discussing accomplishments, challenges, and goals.

Responding to the moment The nature of distance learning necessitates adding, subtracting and/or adapting resources and services "on the fly" as opportunities and innovations arise.

Assessment Process

ACRL Guidelines The department carried out two benchmarking projects in 2005-07 comparing its services to the 2000 *ACRL Guidelines for Distance Learning Library Services*. The North Bay Regional Librarian prepared an analytic report, *Providing Superior Library Service for Distance Learning*, to fulfill the final assignment for the online ACRL course *All Users are Local*. The South Bay Regional Librarian and Library Assistant gathered data on competitor institutions – National University, Golden Gate University and St. Mary's College – using information available on the institutional webpages and through interviews. These comparisons remain available on a departmental wiki, where they can be updated as needed.

Annual reports/Strategic goals Described in the *Planning Process*, these also act as assessment documents in evaluating processes, services, staffing, equipment, etc.

Budget analysis The budget for Distance Services Department and the Regional Campus Libraries is allocated as part of the annual Library budget. Working with the Dean's Budget Coordinator, the Department Head establishes budgets each Regional Library's and the department each fiscal year. Expenditures are continuously monitored and adjusted throughout the year as spending priorities change.

The Annual Graduating Student Surveys Questions about Gleeson/Geschke and the Regional Libraries are included in this survey. The resulting data is shared with the Department Head.

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Student surveys Occasional print or online student surveys that seek to assess the effectiveness of particular instruction sessions are designed and distributed by some of the regional library staff.

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College of Professional Studies New Student Orientations Evaluations Over the past ten years, these orientations have been an important component in library instruction for new undergraduate and graduate students. Survey results help shape the content and scheduling of the librarian presentations.

Informal Continuous informal evaluation of the effectiveness of the libraries by the regional library staff, DLS department, regional campus directors, ITS, and academic program directors bring to light ways to improve operations.

Accreditation considerations The regional libraries are routinely considered when the University evaluates library services for WASC. In addition to self-study reports, a visit to one of the regional libraries is usually included in the evaluators' itinerary.

Future improvements or services

Planned

For the department Continue to improve group decision-making and autonomy using appropriate management techniques and online tools, such as wikis and videoconferencing, as these become available. Develop a departmental wiki for policies and practices. Continue to improve the department's operational efficiency by clarifying roles of department and campus members.

For public services Continue to review and improvement of all forms of communication with students, faculty and regional administrators, especially written information disseminated in any format. Use innovative approaches to reach the student audience, for instance using regional campus library web blogs and instructional podcasts.

The University upgrade of Blackboard, the course management system, will offer new opportunities for a stronger library and librarian presence in online classes, especially those offered by CPS. The DLS staff is attending Blackboard training and investigating how other schools are using this tool for enhanced instruction.

The anticipated purchase of the Illiad product from OCLC will change the interlibrary loan aspect of the Document Delivery service for both staff and DLS patrons.

For staff Continue training for library assistants at one-day main campus sessions. Increase professional development activities for both librarians and library assistants. Evaluate the budget to fund again a support position for the North Bay Library.

For regional campuses Collaborate with the Senior Director of Regional Campuses to improve disaster readiness and awareness. Analyze the needs and respond with appropriate supplies, plans, and training.

Desired

For Regional Librarians Work with Human Resources and the Library Dean to determine a fair and equitable system of compensation and promotion, equivalent to that of the USFFA librarians.

Library Assistants Review position descriptions and work performed to guide training and projects. In light of the new regional nursing programs, analyze work demands and consider whether to upgrade some or all LA positions to Librarian. Evaluate need for additional staff support in North Bay, whether LA or Librarian.

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CHAPTER 7--Collection Development

Submitted by: Locké Morrisey, Head of Collections, Reference & Research Services

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A. Historical Context-Overview:

Up to the Fall of 1999, Collection Development was coordinated by the Head of Acquisitions. Anyone could submit an order for any materials on any topic, except for databases which were coordinated through the Head of Reference. During the Fall of 1999, Collection Development moved to a liaison based model where individual librarians, with a back up librarian, were assigned to specific school and departments within in the University (see Appendix CD1). It was the Dean's desire to have all librarians participate in some aspect of Collection Development whether it was selection, weeding or preservation. At this time, the Head of Acquisitions was given the title Head of Acquisitions & Collection Development. After the Head retired in 2000, the responsibility for coordinating collection development was given to the Head of Reference & Research services while the Head of Periodicals moved into the position of Head of Acquisitions.

B. Organizational Chart (see Appendix)

C. Mission-Statement of Purpose & Goals

The collection development section of the Library Manual has not been updated since December 1992 (see Appendix)

D. Statistical Trends

Most of the collection development statistics are included in the Acquisitions section of this report. The one exception is electronic databases which have seen roughly a four-fold increase from 1997 to the present.

E. Operations

The Head of Collections, Reference & Research Services typically calls a meeting once a semester for library liaisons to discuss current collections issues. There is no separate operations support for collection development. The collections budget is managed through the Acquisitions department. Library liaisons work with their faculty to submit materials for purchase with the exceptions of periodicals and databases. Head of Acquisitions will consult with the faculty member and/or liaison requesting the periodical to make sure it is affordable and within scope of the collection. Requests from new databases (either reference or e-journals) come through the Head of Collections, Reference & Research services after consultation with library liaisons and the Head of Acquisitions. Many of these databases are purchased through a number of consortia, of which, the Statewide California Electronic Library Consortium (SCELC) is most pronounced.

F. Highlights of recent/current projects

The library just underwent a collection-wide monographic weeding project. Library liaison weeded their respective areas by flagging books as candidates for deselection. Then faculty were given 4-6 weeks

to review flagged materials in the stacks to make requests to retain certain materials. After the review period, remaining flagged books are being moved out of the stacks and down to cataloging where they are being deaccessioned. Then these books are being given to Books for a Better World for sale/disposition.

The Reference Desk Library Assistant IV is reviewing the print reference collection to look for books that are in need of repair. After candidates are pulled off the shelves and put on a cart, the Head of Collections, Reference & Research Services reviews the materials and makes one of four decisions: withdraw the book, withdraw the book and order a replacement copy of newer edition, repair the book and put it back into the Reference collection or repair the book and send it to the stacks. All in house repairs are done by the Reference Desk Library Assistant IV. If repairs require rebinding, books are sent out to be rebound.

The library put through a special initiative to the Provost Council to increase the collections budget by \$50,000-\$60,000, specifically for scholarly journals. In addition the School of Nursing put through a proposal to start a Doctor of Nursing Practice as well as expand the graduate nurse clinical leader program to the regional campuses. Built into the nursing proposal was an increase in the collections budget for electronic nursing resources (mostly e-journals). The proposals were both approved but not funded to the full amount that was requested. New materials are currently being selected so they will be accessible for the start of the Fall term.

G. Key Challenges

Collection development and library liaison work is on top of all the other job responsibilities a librarian has. Depending on the interest a librarian has in collection development, sometimes this area gets less attention than it should. The Head of Collections, Reference & Research Services does review general collection development tools to make sure the library is regularly acquiring books in all appropriate areas. All Link+ (expedited book delivery) requests are reviewed by the Head of Collections, Reference & Research Services and forwarded to liaisons if appropriate (within scope and not already owned/ordered). In addition there were a couple of collection development workshops held for liaisons in 1999 and 2000 but there is currently no ongoing, systematic collection development training.

There is a never ending demand for new databases, data sets and electronic journals. USF is hiring top quality faculty who expect to have access to resources that they used as graduate students and at previous academic institutions. The biggest demands currently are from the School of Nursing, School of Business and Science faculty and students (particularly graduate students).

H. Key Collaborations with other departments or units on campus or within the library

The relationship between the library liaisons and the subject faculty as outlined above is one of the most critical collaborations that occurs. Operationally there is also critical collaboration that goes on amongst library liaisons and the Acquisitions and Cataloging departments. With regards to new electronic resources there also is a critical relationship with the Head of Systems to make sure the library's proxy server is configured to allow remote authentication for any new library e-resources purchased or subscribed to.

The Head of Collections, Reference & Research Services does communicate with librarians in the Zief Law Library as to potential collaboration in purchasing print materials and subscribing to new electronic resources, e.g., electronic journals. This has had limited success as the Class B IP address for the

campus covers both the Gleeson Library/Geschke Center as well as the Law Library. So whenever one library subscribes to a site license for an electronic product, the other library will also get access.

There are four regional USF libraries that have small print collections. When a copy of a book is ordered at one of these regional campuses, an additional copy is ordered for Gleeson/Geschke so the book at the regional campus can be used just by those regional students. Regarding electronic resources, the part-time librarians at the regional campuses are consulted as to database trials and new electronic full-text journal or database subscriptions as they and their student rely heavily on electronic full-text resources.

I. Key Contributions to service, learning and scholarship at the University

Library liaisons have created subject web pages to help faculty and students get to appropriate information resources. These web resource pages have recently been expanded to include more interdisciplinary programs such as Ethnic Studies.

For almost all subject disciplines the primary library liaison or the backup is a member of the Reference & Research Services department. Typically, liaisons (or backups) are responsible for the soliciting and executing subject specific library instruction requests from faculty. In addition, specific one-on-one research consultation requests are often provided by a librarian who is responsible for the school or department that the student is enrolled in, e.g., nursing liaison takes on the majority of the nursing student requests for research consultation.

J. Planning & Assessment Process

Besides the once-a-semester library liaison meetings, much of the planning and assessment process for collections occurs within the Library Leadership Team and/or with consultation of individual or small groups of library liaisons.

K. Future improvements or services

The Head of Collections, Reference & Research Services is often asked to trial vendor databases for a limited period of time. At times, this information gets lost in e-mails, announcements, etc such that people often forget how to get to these resources. We would like to create a database trials page to consolidate all of this information.

The Collections Section of the Library Manual is woefully out of date. It should be updated to reflect new programs and new policies that have been implemented over the past 15 years. It should be available on the library's secure Library Administration Page so all library staff would have access to it. This will be looked at as a potential goal for 2008-2009.

With the additional money added to the library's budget for science and nursing resources, we are looking at ways to beef up the collections in other areas that have collections gaps in them, particularly in the area of electronic full-text journals.

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CHAPTER 8-- Donohue Rare Book Room

Submitted by: John Hawk, Head of Donohue Rare Book Room

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Introduction

The Donohue Rare Book Room houses the Library's special collections which include rare books, prints, and literary and historical manuscripts. Exhibitions are displayed regularly and may be viewed during regular Rare Book Room hours. The Rare Book Room is open 40 hours a week. Regular hours are Monday, Tuesday, Wednesday, and Friday, 9:00 a.m. to 5:00 p.m. and Thursday, 11:00 a.m. to 7:00 p.m. Appointments are not required, but may be made for the convenience of the patron. Materials located in the Donohue Rare Book Room are cataloged in *Ignacio*, the online catalog, and are paged on demand. The Donohue Rare Book Room and the collections are accessible to the University Community. Patrons not formally affiliated with the University may make an appointment in advance to access to the Rare Book Room and its collections.

William J. Monihan, S.J., who was the Director of Library Relations and a guiding force in the establishment of the Rare Book Room, acquired the Thomas More collection in 1951. This collection was the initial nucleus of special collections at the Gleeson Library. The Library hired its first special collections librarian in 1968 and in 1972 the Donohue Rare Book Room was dedicated. From this beginning, the collection has grown and developed over time. The collection now includes over 15,000 books and 283 linear feet of manuscripts. The collection has been built through a combination of gifts and purchases. The collections have depth and are remarkably focused. In addition to the Thomas More collection, other major collections include the Albert Sperisen Collection of Eric Gill; the Dr. Wallace Friedman Collection of Frank L. Baum and Oziana; recusant literature, modern fine printing (with an emphasis on California printing); and literature of the English 1890s. Collections of literary and historical manuscripts include those of Anaïs Nin, Robinson Jeffers, Robert Graves, Graham Greene, Charles Carroll of Carrollton, and the Breen Family to name but a few. The Rare Book Room collections continue to be developed according to these strengths as new materials are routinely acquired and cataloged for the collection. In the past three years 285 volumes have been cataloged for the Rare Book Room.

Operations

The Rare Book Room is a vital public service point in the Library and serves students, faculty and outside patrons throughout the year including summers and academic breaks. The Rare Book Room is often frequented by groups and classes. Faculty from a number of Departments bring their students to the Rare Book Room on a regular basis for presentations and class projects. Outreach to the Bay Area book community is also a key function in the Rare Book Room. Constituents from outside the Library are an important audience for the Rare Book Room. In the past few years the Rare Book Room has collaborated with several organizations, including the Hand Bookbinders of California, the Arion Press/Grabhorn Institute, the Book Club of California and the Antiquarian Booksellers Association of America.

In the past three years (since July 2004) over 5,300 patrons have visited the Rare Book Room; the Rare Book Room has participated in 42 Library tours and 31 classes have visited the Rare Book Room for presentations and introductions to the collection. During this time there also have been 9 exhibitions (three a year) and 17 public programs.

A less visible aspect of operations involves the continuous activity of processing backlog materials housed in auxiliary storage spaces. A significant amount of time and effort is expended to bring greater physical and intellectual control to these materials. In the past year the Rare Book Room lost a significant amount of storage space when Academic Support Services moved into the Library's Lower Level. Relocating these

materials was a major project in 2006. Though it was an opportunity to review materials and bring greater physical control to the backlog, it was also a challenge to relocate the material in other spaces. These backlog materials are now stored in a less secure storage space that is at near-capacity.

Key Challenges

The Head Librarian of the Rare Book Room is a Department Head, a member of the Library's Leadership Team and reports to the Dean of the Library. The Donohue Rare Book Room is also a "one librarian" operation. The Librarian is responsible for all aspects of management of public service, exhibitions, outreach, collection development, collection management and all administrative duties related to the Rare Book Room. The Rare Book Librarian also has responsibility as the Library's liaison to the Gleeson Library Associates (the Library's friends group) and is Library Liaison to the History Department. Having direct responsibility for all of these functions is rewarding, but it can also be a challenge when these responsibilities must necessarily be balanced with routine clerical and housekeeping duties. The Rare Book Room does have a Student Assistant to assist with such matters, but one still finds oneself engaged—particularly related to duties pertaining to the Gleeson Library Associates—in matters of processing checks, invoices, purchase orders and related membership support services. The time necessary for these routine clerical activities takes away from time spent caring for and providing access to the collections.

Key Collaborations:

The Rare Book Room has been and continues to be engaged in several core functions and initiatives within the Library, with other Departments on campus, and with the larger Bay Area book community. Within the Library, the Rare Book Room is fully integrated into the overall operations of the University Library. Key library technical services activities take place in the Acquisitions and Catalog Departments. The Head Librarian of the Rare Book Room works closely with colleagues in monitoring the flow of special collections materials and addresses issues or concerns as they may arise. Records of Rare Book Room material are integrated in the Library's online catalog. As a service-point, the Rare Book Room is also in communication with the Access Services and Reference and Research Services regarding Rare Book Room programs and operations that have implications for those departments. Listed below are details of some key collaborations:

Library Collaborations:

Library tours and instruction

The Rare Book Room is included in all orientation and building tours held at the start of the fall and spring semesters. As each group visits the Rare Book Room, the Rare Book Room Librarian gives an introduction to the Rare Book Room and its collections. In addition to these building tours and orientation sessions, the Rare Book Room also hosts more intensive hour-long class visits and presentations.

Podcasts

Since April 2006 all Rare Book Room and Gleeson Library Associates programs have been recorded and made available as podcasts on the Library's web page. This project is a collaboration between the Rare Book Room Librarian (who records the talks) and Reference and Research Services Librarian, Randy Souther, who posts them on the Library's web pages. These programs, known as "Gleeson Talks" are also available for free download in the Apple iTunes store.

Online Exhibitions

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Rare Book Room exhibitions are regularly promoted and documented on the Library's web page. These online exhibitions allow for a permanent record of the exhibition, long after the exhibition has ended. As with the podcasts, the Rare Book Room Librarian and Randy Souther collaborate to make these checklists, photographs and slideshows available on the Library's web site.

Email reference

The Rare Book Room Librarian participates in the email reference program. Library users can email questions to the Librarian through the web site. These queries are directed to the Librarian directly or may be forwarded from Reference and Research Services.

Library Internship program

Each semester the Rare Book Room Librarian meets with Library School interns from San Jose State University School of Library and Information Studies who are doing their internship in Reference and Research Services. In the fall of 2006, the Rare Book Room co-hosted one of these interns, Stephanie Daddino, who worked several hours a week in the Rare Book Room on a project to identify, sort and arrange a large collection of fine press printed ephemera.

Campus Collaborations:

History Department and Office of Service Learning

The Rare Book is actively involved in the University's Service Learning curriculum and mission. Since 2003, the Rare Book Room has hosted an intern from the History Internship course taught in the History Department at USF. The course is designated as a service-learning course. This collaboration provides key support in a core value of the University and offers a unique opportunity for students to have an extended hands-on experience with rare and unique materials.

Thacher Gallery

The Rare Book Room has collaborated with the Thacher Gallery on a number of exhibitions and programs. Most recently, materials from the Rare Book Room were loaned for the *Sacramental Light* exhibition. The Rare Book Room has also hosted several artist talks prior to Gallery openings. These have been successful and well-attended. Past collaborations between the Thacher Gallery and the Rare Book Room have included exhibitions of Jesuitica, works published by the Arion Press, materials from the L. Frank Baum Oz collection, rare Californiana, and works by Athanatius Kircher, Lawrence Ferlinghetti and David Lance Goines.

Davies Forum

In the 2006 fall semester the Rare Book Room hosted a Davies Forum lecture by Dr. Candace Falk, Director of the Emma Goldman Project at the University of California, Berkeley on the topic of Emma Goldman. The lecture was part of the Davies Forum course *Camouflage and Representation: Jewish Women in the Arts* taught by Professors Paula Birnbaum and Sharon Siskin of the Department of Visual Arts. The Rare Book Room also hosted an exhibition of book work (unique artist's books) created by students in the class. At the end of the semester, there was a reception in the Rare Book Room at which time students introduced their work to their classmates and guests.

Teaching and instruction

Faculty and students visit the Rare Book Room throughout the academic year for focused presentations on materials in the collection. Faculty who regularly schedule class visits to the Rare Book Room include

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Martin Claussen (History), Benjamin Kline (History), Stephanie Vanderick (ESL), Andrew Junge (Visual Arts), Rosmarie Deist (St. Ignatius Institute), Benjamin Wells (Mathematics), Sr. Sieu (St. Ignatius Institute), Alberto Huerta (Modern Languages) and Frank Cole (Visual Arts). During these class visits The Rare Book Room Librarian introduces materials from the collection and students have an opportunity to view and handle the materials.

Bay Area Book Community Collaborations:

Hand Bookbinders of California

In the fall of 2006 the Rare Book Room hosted the Annual Members Exhibition of the Hand Bookbinders of California. The exhibition featured over 40 works by hand bookbinders from throughout the county who submitted work for this juried exhibition. The Rare Book Room also hosted an opening reception for members of the Hand Bookbinders, the campus community and the general public. The exhibition was an excellent opportunity for the Library and showed goodwill on the part of the Library to the Bay Area book community.

The Arion Press and Grabhorn Institute

The Rare Book Room has collaborated with the Arion Press and the Grabhorn Institute on a number of occasions. Most recently, materials from the Rare Book Room's collection of Hogarth Press books printed by Leonard and Virginia Woolf were made available for two separate exhibitions at the Arion Press/Grabhorn Institute. The Rare Book Room collections were featured prominently at two programs at which Professor Peter Stansky, Professor Emeritus at Stanford University, gave a talk on Leonard and Virginia Woolf and their Hogarth Press. The Rare Book Room and the Library "shined" at this program.

Book Club of California

The Rare Book Room and the Book Club of California have collaborated on a number of exhibitions, including ones on the Allen Press, the Grace Hopper Press and the works of L. Frank Baum.

American Printing History Association

In September 2005 the American Printing History Association held its annual conference in San Francisco. The University hosted APHA's J. Ben Lieberman Memorial Lecture on September 24, 2005 at the Lone Mountain Reading Room. The esteemed printer and printing historian Richard-Gabriel Rummonds gave a talk on his "path to the iron handpress."

ALA/ACRL, RBMS section

In 2001, the Rare Book and Manuscripts section of ACRL held its annual preconference in San Francisco and Berkeley. The Gleeson Library/Geschke Center played a role in this conference by hosting one of the workshops in the Library's Electronic Classroom and hosting a coffee break in the Rare Book Room. The University also provided campus housing for the preconference. The Rare Book Librarian, who was co-chair of the RBMS Local Arrangements Committee, was instrumental in involving the Library in this important preconference within the profession.

ABAA (Antiquarian Booksellers Association of America)

In February 2001 the Rare Book Room was invited by the Northern California Chapter of the ABAA to be the institutional exhibitor at the California International Antiquarian Book Fair in San Francisco. The California International Antiquarian Book Fair is the largest rare book fair in the world and draws

booksellers and attendees from throughout the country and internationally. At the Fair, the Rare Book Room exhibited treasures from several collections in six vertical, free-standing cases. Dozens of books were exhibited, from sixteenth-century books from the Sir Thomas More Collection to twentieth-century artist's books and examples of fine printing. The ABAA Book Fair was a wonderful "stage" for the Rare Book Room and the Library to present itself to a wider public. The experience of collaborating with the ABAA was very positive.

Key contributions to service, learning and scholarship at the University:

The Rare Book Room provides valuable service to the USF learning community in a variety of ways. One of the fundamental ways in which it does so is by providing students, primarily undergraduates, with an opportunity to experience and have access to rare and unique research materials. Students at the University of San Francisco have access to a wealth of special collections that is unparalleled at peer Jesuit institutions. As a teaching collection, these materials bring value to students' educational experience and support the University's core values of excellence and scholarship.

Future improvements or services:

The Rare Book Room enjoys ample support from the Library Dean, as well as from other individuals and departments in the Library and on campus. Past and current initiatives have been met with encouragement. The Rare Book Room is also in the fortunate position of having a number of restricted funds available for the purchase of materials. In nearly every way, the Rare Book Room operates on a solid foundation of Library and campus support.

Desired:

As in any special collections environment, the most important concern must be for the security of the materials. Though the Rare Book Room has very good layered-security measures in place, there is concern for the current design of the Rare Book Room and hope that a minor modification can be made which will greatly enhance both security and service. At the time that the Rare Book Room was constructed in 1972 an office space was constructed in the middle of the room. Since that time, this area has served as the office for the Rare Book Room Librarian. The office is problematic, however, in two key ways: it prevents optimal sight-lines to monitor use of collections in the reading room; it also provides an unnecessary barrier when greeting and interacting with patrons. Demolishing the office would greatly enhance reading room security at the same time improve service by ridding the Rare Book Room of this artificial, yet very real barrier between patrons and library staff

CHAPTER 9.1 Technical Services-Acquisitions

ACQUISITIONS DEPARTMENT

Submitted by: Kathy Woo, Head of Acquisitions

Mission and Goal

The Library endeavors to acquire, within its financial and other limitations, materials that reflect the educational objectives and curricular needs of the University for fulfilling the institutions' purposes as

stated in its "Mission and Goals." The goal of the Acquisitions Department is to provide instructional resources in all formats needed by students, faculty, administrators and staff to meet these purposes, as well as to provide materials broader in scope than any particular subject area.

The Acquisitions Department is responsible for the ordering and receipt of these materials, processing them for payment on receipt, management of the library materials budget, and providing financial management data. Every effort is made to accomplish the necessary business transactions in a cost-effective and timely fashion, at all times maintaining high ethical and best business standards. The Acquisitions Librarian works closely with vendors and publishers to ensure prompt, efficient and responsible collection development processes.

Academic Freedom

The Library affirms the right of individuals to free inquiry and the freedom to recommend the selection of materials based on sound academic grounds according to the instructional and research needs of the University.

Staffing

The Acquisitions Librarian is head of the Department and has responsibility for all aspects of the library materials budget. The Acquisitions Coordinator (Library Assistant V) is responsible for all aspects of periodicals processing, including check in, claiming, and invoicing. In addition, the Acquisitions Coordinator creates, registers and maintains web links in the online catalog for all electronic journals subscribed by the library. Two Acquisitions Specialists (Library Assistant IV) search, order, receive, claim, and process invoices for firm and standing orders.

Interrelationship with Other Library/University Departments

As part of the Technical Services Division, the Head of Acquisitions and the Head of Cataloging work together to effect the efficient acquisition and processing of library materials. Library student assistants are shared and Library Assistants are cross-trained where feasible.

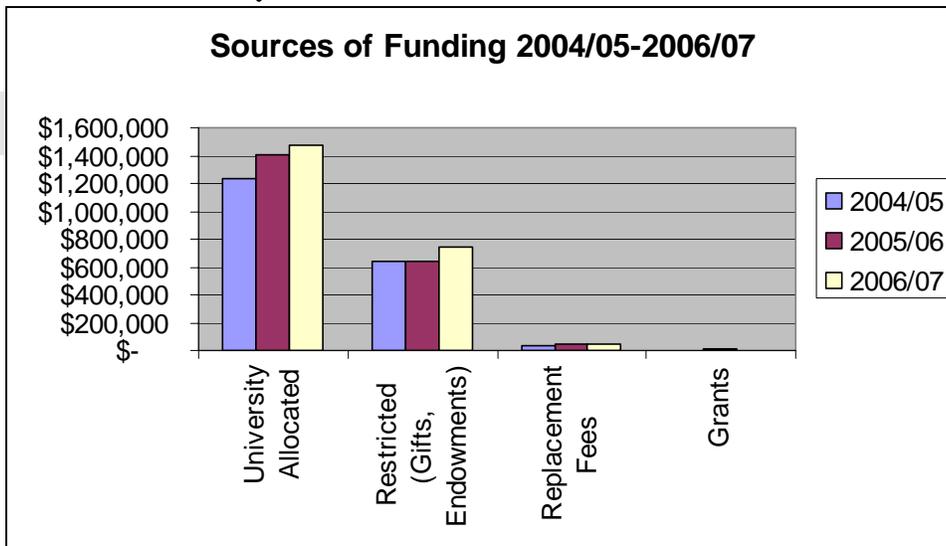
All Acquisitions staff works closely with all library liaisons in the acquisition of required library materials. A close working relationship with the Assistant to the Dean and Budget Coordinator, the Systems Librarian, the Head of Collections, the Head of Special Collections, the Electronic Resources Librarian and the Head of Access Services is essential to the department's fulfillment of its mission.

Outside the library, the Head of Acquisitions consults with faculty regarding materials acquisition, and, with the Library Dean, has a strong working relationship with the Associate Provost for Academic Affairs, the Vice-President for Business and Finance, the University Controller, the staff of Accounts Payable, and the University Auditors.

Funding and Expenditures

The University fiscal year is June through May. Preparation for next fiscal year's budget begins early fall although frequently the final budget is not disseminated until three or four months into the new fiscal year. The primary sources of funding are University allocated funds, restricted and gift funds, University strategic initiatives, replacement fees, and grant funds.

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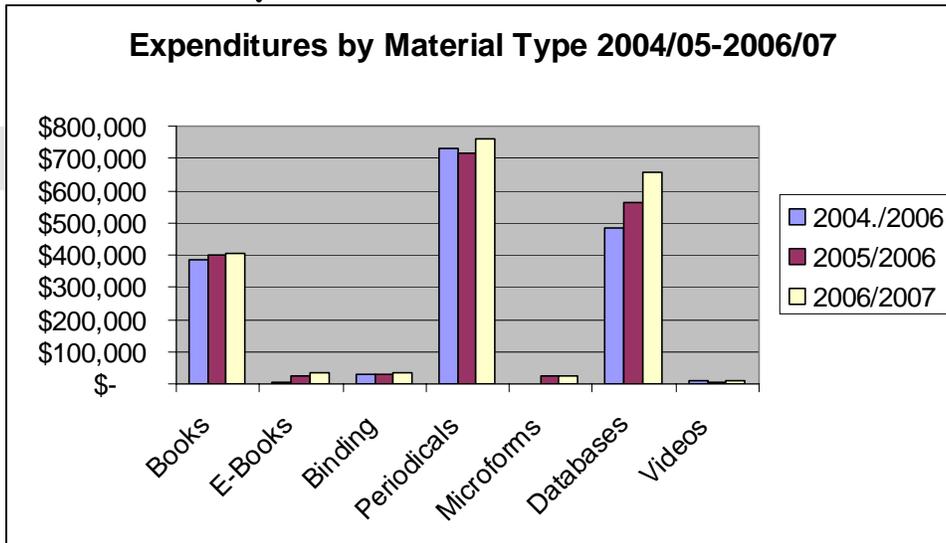
In recent years, the University allocated budget increases to the materials fund has been between two and three percent while costs for periodicals and electronic resources have increased in the eight to 12 percent range. In order to maintain subscriptions and add new electronic resources, the Library Dean traditionally has had to appeal for more funds or use the University strategic initiative process to acquire more funding. In addition, a greater reliance on restricted funds has been necessary. With the exception of the two years of periodical and database cancellations discussed below, the Library Dean has been very successful in increasing our base budget through the initiative process. Through the initiative process, the Dean was able to increase our base budget by \$300,000 between 2004/05 and 2006/07. Another significant achievement by the Dean was his success in finally convincing the University budget managers to designate our periodicals and electronic resources subscriptions as contractual obligations so that the annual increases will be covered. This goes into effect in 2007/08.

As is true for every academic library, the challenge has been to find within the context of limited funding the balance between print and electronic resources as well as the balance between books, periodicals, and databases. While maintaining a substantial print collection of periodicals, our trend has been to dedicate a greater percentage of our resources to electronic by converting from print to online for individual subscriptions, adding full-text databases, participating in periodical publisher packages through our consortium and purchasing back files of full text journals. We currently subscribe to 2,104 journal titles and provide access to approximately 50,000 journals through our databases.

See *Table 1* for expenditures by material type and source of funding for the past three years.

The following chart shows our expenditures over the past 3 years by source of funding and types of materials acquired

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Gifts and Donations

Gifts are the responsibility of the Head of Acquisitions and the Cataloging & Gifts Librarian who dedicates approximately 10 percent of her time to evaluating and processing book donations. Unsolicited donations are evaluated in terms of the usefulness of the materials to the Library's collection in the context of the general collection management policy. The Library reserves the rights to accept, reject, retain or dispose of gifts as judged appropriate. To address the issues of space and staff limitations, the library recently initiated a policy of requiring potential donors to submit a list of the books they wish to donate for our consideration.

Operations

Book requests are facilitated by the librarian liaison structure. The other major source of book requests is through the Suggest a Book feature in the online catalog. This feature is used by faculty, students, staff and retired faculty and thus allows for input by a broader range of patrons. All book requests that fall within the Collection guidelines have been positively considered over the past several years. Most periodical subscriptions requests come from faculty. Very few new individual periodicals have been added over the past four years. The emphasis has been to provide access to more journals that meet the curricular needs of our students through subscriptions to aggregated databases and participation in consortia publisher packages. Full-text database selection is performed primarily by the reference librarians in consultation with faculty and the library liaisons. Because of our limited funding for videos, almost all requests come from faculty.

The Acquisitions Department has longstanding relationships with a number of vendors. Firm order books are purchased from Midwest Library Service or The Bookhouse. Standing orders are purchased from Midwest or YBP. Periodical subscriptions are placed with Ebsco Subscription Services and we utilize their Electronic Journal Service for maintaining links to e-journals. Rush orders are placed with Barnes and Noble, Amazon, or other online merchants. Most of our OP book orders and video orders are placed online. The majority of database subscriptions are placed through our consortium, SCCLC. Most recently we have added a number of publisher package agreements through SCCLC.

Brief bibliographic records are imported from OCLC into our Innovative Interfaces module and orders created and exported directly to our vendors. Invoices are received with the books and processed within the

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Innovative system. The annual periodical renewal invoice is received and processed electronically. All invoices are assigned funds, checked for correct tax accrual, and approved within the department and then sent to Accounts Payable for check production. Two years ago, the University made purchasing cards available to staff which has greatly improved our ability to fill rush requests.

Books are received in the Acquisitions Department and upon receipt of invoices, sent to Cataloging for further processing.

The Acquisitions Department receives one copy of doctoral and master's theses from the schools and ships them to an outside binder for binding prior to their inclusion in the library collection. The library, in collaboration with the School of Education, is currently implementing electronic submission of Ed.D. dissertations. Doctoral dissertations are also sent to Proquest for inclusion in their Dissertations and Theses Program.

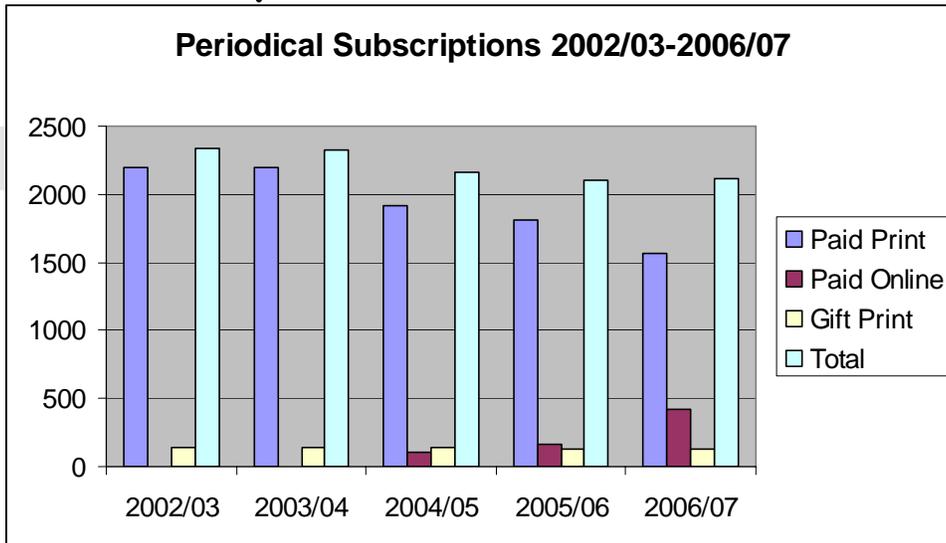
The Acquisitions Librarian collaborates with the Access Services staff to identify books for replacement. Missing, lost and damaged books are replaced when possible and as funding permits.

Periodicals/Database Cancellation Projects

Unlike many academic libraries, we did not have to conduct any periodical cancellation projects between 1978 and 2004. However, by the end of fiscal year 2003/2004 it became apparent that the library would not receive a materials budget sufficient to cover our periodicals and electronic resource commitments in 2004/2005. The decision was made to cancel 177 journals and 11 databases for a savings of \$88,000.00. The librarians considered level of use versus cost as well as availability in full-text databases in identifying the journals for cancellation. Almost all the library's popular journals were cancelled. The Dean consulted with the University Executive Council prior to the cancellations. It was understood that the library would make the decisions because of time constraints.

Looking ahead to 2005/2006 we anticipated the need for further cancellations. In order to include the faculty more fully in the decision making process, the Dean initiated meetings with each academic department during the 2004/2005 academic year to discuss periodicals price increases in general and how they are affecting USF in particular. Each department was given a list of periodicals for their subject area and a target amount for possible cancellation. Each was asked to identify titles for possible cancellation. These meetings were successful in helping the faculty understand the issues facing the library as well as allowing their input in the process. The final list of titles identified for possible cancellation was then emailed to the University faculty over the summer for input from interdisciplinary perspectives. Fortunately, in the meantime, the Dean led a successful strategic initiative to increase materials funding so that the number of journals we had to cancel was reduced from 300 to 55.

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Key challenges

Format migration: While the majority of our individual journal subscriptions are still print, we are increasingly migrating to online. In the past year, we migrated to online for major publishers such as Springer, Sage, Elsevier, and Blackwell in order to take advantage of consortia packages that allow our patrons access to hundreds of titles subscribed to by other participating consortia libraries. We are also migrating to online subscriptions for individual titles when appropriate and cost effective. This migration presents a number of challenges:

Access—ensuring we are receiving what we have paid for and establishing and maintaining links.

Record keeping—the publisher packages involve commitments to maintaining subscriptions and require monitoring to make sure that the contracted price caps are honored.

Archiving—unresolved; we are investigating initiatives such as LOCKSS & Portico.

Bibliographic control—we are continuously discussing how much access to provide at the title level through the online catalog and how much to rely on the library web page “Journal Finder” provided by Serials Solutions.

Our purchase of e-books has been limited to consortia agreements with NetLibrary, ebrary, Safari, and a few smaller, publisher packages. We are planning to investigate the feasibility of contracting with an e-book vendor for purchasing individual titles.

Budget cycle: We are often three to four months into the new fiscal year when we receive our final allocation of University funds for that year. Even with the strategic initiative process whereby the Dean acquired an additional \$100,000.000 to our base budget for 3 consecutive years, there was uncertainty. In 2006/2007, the final year of the funding from the strategic initiative, we received \$50,000 in September but did not know if we were to receive the final \$50,000 until April. This creates a planning challenge.

Minimizing duplication of content in full-text databases: Some duplication between aggregated, full-text databases is unavoidable. Also, at this time, some duplication between print and online content is the only way for us to ensure archival access. However, with current financial restraints, it is imperative to minimize duplication of content.

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New financial accounting and reporting system: Business and Finance is implementing a new FRS system June 1, 2007. As a key budget center, the library will participate in this implementation. All funds are being renumbered. At this time it is unknown how drastically our workflow will be affected by this change, but we anticipate major disruptions as the system is developed. Furthermore, the University is migrating from cash accounting to accrual accounting. We have had many discussions regarding the implications of this for the library and anticipate a difficult adjustment period in the immediate future.

Space: While we are continuing to add print books to the collection and have no intention of discontinuing, the ongoing space problem facing the library will soon necessitate evaluation of the quantity of books added. Print journal usage versus space occupied is another issue that requires attention. The obvious solution to maintain at least our core collections in the library building is for the University to return the lower level and fourth floor space for library use upon completion of the University building projects.

Contributions to service, learning and scholarship at the University

The Acquisitions Department strives to solicit recommendations for library materials to purchase from all library users on campus. This past year Technical Services staff tried a new approach to solicit book suggestions in an endeavor to increase our graphic novel holdings. We set up a colorful and graphic display titled “Get Graphic @ Your Library” in the lobby. We displayed a number of graphic novels, supplied a print bibliography of our graphic novel holdings and had a large suggestion box with forms for suggestions for graphic novels for us to acquire. The response was very positive and we even had a Communications class that created a blog around our display. We received over 60 suggestions for novels to acquire.

We constantly strive to maximize available technology to provide required materials in a timely and cost effective way. An example is our use of online booksellers to locate, do cost comparisons, and order rush requests, out-of-print titles, and videos. Also, we monitor technological advances that would improve workflow and increase efficiencies.

Our participation in consortia for the purchase of aggregated databases and electronic journal collections has allowed us to provide access to thousands more titles than we would otherwise be able to provide.



CHAPTER 9.2 *Technical Services-Cataloging*

Technical Services Program Review[I]

Submitted by: Eric Ewen, Head of Cataloging

[Historical Overview] In 1967, when Dr. Robert H. Gitler came to USF as University Librarian, Gleeson Library had a different operational and organizational structure than it does today. The library formally consisted of two divisions embracing five departments. The Public Services Division included the Reference, Circulation, and Periodicals Departments. The Government Documents and Interlibrary Loan units were part of Reference; Reserves reported to Circulation. The Technical Services Division consisted of the Acquisitions and Catalog Departments. Gifts & Exchanges were a unit of the Acquisitions Department. Not counting the University Librarian, a staff of fourteen professional librarians served the library and its clientele. Eight of these were assigned to the Technical Services Division: the Head of Technical Services, three acquisitions librarians, and four catalogers. The number of library assistants in the Technical Services Division varied from about eight to ten. At that time “library automation” at Gleeson consisted in an assortment of electric typewriters and a Xerox machine for the photoduplication of sets of catalog cards. OCLC was just getting started in Columbus, Ohio.

A “palace coup” or “revolt” of some sort took place in 1968. The two division heads, along with three department heads, resigned their positions in an attempt to put pressure on Dr. Gitler to make changes in the way he administered the library. The exact issues that provoked this action are still unclear. The University Librarian called their bluff and immediately accepted their resignations without further discussion or review. Although some of them tried to retract, Dr. Gitler insisted on their departure and so they were dismissed. Dr. Gitler chose this occasion to reorganize the library along the lines of a much flatter model. He appointed new department heads but abolished the positions of the division heads. He also hired Paul Birkel to the newly created position of Associate University Librarian, among other things to perform some of the work previously done by the division heads.

A Special Collections Department was created in 1974 and added to Public Services (now not a formal division, of course, but an aggregation of departments which dealt primarily with the public). It was in this year, too, that Ms. Kathleen Woo and Mr. Eric Ewen joined the Gleeson Library as catalog librarians.

In early 1976, during one of USF’s innumerable financial crises, the university administration enforced its mandatory retirement policy and requested the resignation of Dr. Gitler. Paul Birkel was then made University Librarian. As a cost-cutting measure his former position of Associate University Librarian was abolished, thereby making the organizational structure of the library both very lean and very flat. Later, in 1979, Mr. Birkel’s title was changed to Dean of the University Library.

Gleeson Library embarked upon its first major venture in library automation in October of 1978 when it joined the OCLC bibliographic utility. At this time the OCLC bibliographic database included about eight million records. The Library of Congress authority files were not yet online. Almost immediately the Catalog Department began the process of “retrospective conversion,” that is, of converting its entire manual shelflist to machine-readable form in hopeful anticipation of implementing an online catalog in the not too distant future. Meanwhile, in 1980, Ms. Woo had become Head Periodicals Librarian, after having served in both the Catalog and Reference Departments. Three years later, Mr. Ewen took over the direction of the Catalog Department.

Not long afterwards, during the early to mid 1980s, the Reference Department increased Gleeson’s exposure to automation when it began subscribing to remote access databases such as DIALOG and ERIC. By the end of the decade the reference staff were performing an enormous number of very sophisticated

searches on a wide variety of databases for their patrons. It was in 1984, during these exciting years, that Ms. Karen Johnson joined Gleeson Library as a catalog librarian.

Under pressure from WASC, who insisted that USF provide full library services to its remote campuses and patrons, the Board of Trustees in 1989 approved special funding for Gleeson Library to purchase an automated library system. An ad-hoc task force, chaired by Dean Birkel, was created for this purpose. The task force included representatives from the teaching faculty, Information Technology Services, and the Gleeson and Law Libraries. Both Ms. Woo and Mr. Ewen were appointed to this committee. So, too, was Ms. Johnson, whose interest in and expertise with library automation at all levels, from PCs to networks and systems, made her an especially valuable member. With the help of outside consultants, the task force drew up a detailed request for proposal and sent it out to those vendors who could deliver an automated, fully-integrated, sole-source, turnkey library system. Six firms responded, three were considered, and, after many demonstrations and discussions, Innovative Interfaces, Inc. (Triple I) was finally selected as the winning bid and its product installed in the fall of 1990. Extensive testing of III's system ensued for several months. Then, in the late spring semester of 1991, Gleeson Library went completely "online."

At this time Ms. Johnson, still an Assistant Catalog Librarian, was given responsibility by Dean Birkel for general oversight of the new library system. Remaining in the Catalog Department, her duties at first were 50% cataloging and 50% systems. Later, in 1996, the new Dean of the Library, Tyrone Cannon, appointed Ms. Johnson to be Gleeson Library's first Library System Manager. This was a newly created full-time position reporting directly to the Dean. Eventually Ms. Johnson was invited to become a member of the Library Leadership Team.

Other changes in Technical Services (not a formal division, but an aggregation of departments, like public services) continued to take place. In 1997 Dean Cannon decided to enhance library service in general and to increase access to U.S. government documents in particular by hiring a Reference Librarian specifically interested in working with documents. The new librarian, Ms. Kathryn Brazee, was given responsibility for providing the public service aspects of the documents collections. Concomitantly all federal documents were to be brought under full bibliographic control by the Catalog Department. This included the assignment of Superintendent of Documents classification numbers for shelf arrangement in the documents room. A Documents Technical Services Assistant, Ms. Debbie Benrubi, was added to the Catalog Department to direct this work. Another change occurred in late 2000, when Ms. Woo became the new Head Acquisitions Librarian, replacing Ms. Hille Novak who had served in that position since 1969. Dean Cannon took this opportunity to make some modifications to the organizational structure of Gleeson Library. He removed Periodicals as a separate and distinct department of the library and placed its public service operations under the Reference and Research Services Department. The technical services components of Periodicals—such as ordering, receiving, and check-in—he transferred to the Acquisitions Department. Further, in 2003, when Ms. Benrubi became the successful candidate for the newly created position of Technical Services Librarian, needed attention was given once more to the gifts operation. As part of her duties, Ms. Benrubi became responsible for evaluating and processing gifts, an activity that had not received much consideration since the late 1960s when the Acquisitions Department enjoyed the services of three professional librarians. Finally in early 2007, anticipating future trends in providing library information services to the university community, Dean Cannon created the entirely new position of Digital Collections Librarian. After a national search, Ms. Jessica Liu from Texas Tech University was selected for this challenging assignment. She will report to the Head of Library Systems and, along with her supervisor, be responsible for the general planning, implementation, and oversight of all digitization projects initiated or supported by Gleeson Library.

So now, in midyear 2007, that marvelous aggregation called the "Technical Services Division" of Gleeson Library is comprised of three closely related departments, namely, Acquisitions (with Gifts and Periodicals Technical Services), Cataloging (with Documents Technical Services), and Library Systems

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(with Digitized Collections). The staff, much smaller than in the 1960s, includes six professional librarians and five technical assistants. The OCLC database has more than 100 million bibliographic records and the LC authority files are online. It has truly been a fascinating 35 plus years for those librarians at Gleeson who have worked “behind the scenes.” What the next 35 years will hold is anybody’s guess. The current accelerated rate of change is too hard to predict.

[Mission Statement] The Catalog Department does not have a formally articulated mission statement. However it is not hard to imagine what one would look like. It would be threefold in nature. To begin, the primary mission of the Catalog Department is to exert complete bibliographic control over all library materials, in all formats, and in all locations which comprise the comprehensive collections of the Gleeson Library. The secondary mission is to maintain the integrity and internal consistency of Ignacio, Gleeson’s online public access catalog. Finally, the third mission of the department is to provide information to other library departments and the university community in general about the philosophy, goals, and practices of the overall enterprise of bibliographical control. This mission statement is the driving force behind the organization, activities, and operations of the Catalog Department, all of which will be described more fully below.

[Current Operations and Staffing] The primary function of the Catalog Department is to provide centralized bibliographic control for all materials and collections in Gleeson Library. This includes the general stacks, the Reference collections, the Rare Book Room, Periodicals, Government Documents, and Lone Mountain Storage. The format of library materials with which the Catalog Department regularly works consist of print books and journals, maps, compact discs, videorecordings, sound recordings, and a wide array of electronic resources. In addition the department maintains the specialized collections of the Jesuit Library, located at the Loyola House Jesuit community, and the Archives of Modern Christian Art, housed in the west tower of St. Ignatius Church. The Zief Law Library has its own staff and is administered separately. Likewise the Chinese Library, a component of the Ricci Institute for Chinese-Western Cultural History, operates practically independently of Gleeson Library, though organizationally it is still considered a branch of Gleeson.

The main purpose of this enterprise of bibliographic control is to provide intellectual access to the collections, to organize the bibliographic files in a consistent and logical manner, and physically to arrange the materials on the shelf in a way that fosters ease of use. Bibliographic control succeeds to the extent that the library’s clientele can find what they want, or can have their questions about the collections answered, with a minimum of intervention by staff. Making patrons self-sufficient is the true aim of bibliographic control. Sometimes it is said that great cataloging is done for the convenience of the user and not for the convenience of catalogers themselves.

Traditionally various metadata schemes have been employed by catalogers to perform their work of extending complete bibliographic control over their ever-growing collections. At Gleeson, as at most academic and research libraries throughout the English-speaking world, the major metadata schemes now in use are: 1) Anglo-American Cataloguing Rules (2nd ed., 2002 rev.) for descriptive cataloging; 2) Library of Congress Subject Headings and Subject Cataloging Manual for subject analysis; 3) LC Classification Schedules for classification numbers and shelf arrangement; 4) MARC21 Formats (Machine Readable Cataloging for the 21st century) for the automated control, storage, manipulation, and exchange of bibliographic data; 5) OCLC Bibliographic Formats and Standards, a crosswalk to MARC21 for use with the OCLC Bibliographic Utility, the database that provides Gleeson Library with its bibliographic and authority records; and 6) FRBR Model (Functional Requirements for Bibliographic Records) for the underlying philosophical foundations of bibliographic control based on the entity/relationship/attribute schema.

Using the above mentioned metadata schemes, catalogers at Gleeson prepare “standard” bibliographic records for all the materials in their library. The first feature of such a record is the bibliographic description. This consists of up to eight data elements such as the title, edition statement, imprint, collation, and notes with which every catalog user is quite familiar. The bibliographic description identifies the intellectual content of the literary work at hand and its particular physical manifestation. The description also includes certain headings or access points, such as titles proper, uniform titles, and names (personal, corporate, and conference) by which the record can be indexed in the catalog. For works of nonfiction subject headings are also added to the record. These can be topics, names, geographic terms, genres, or uniform titles. Subject headings, although they can become quite complex when they include various subdivision strings, provide a powerful indexing capability to the catalog. The addition of a classification number completes the standard record. These numbers keep like materials together in the collection and tell the user where the item can be found on the shelf. A classification number, then, performs two basic functions. It says something about the subject of the item; it also provides an “address” for the item.

Ideally there should be an exact one-to-one mapping between items in the collection and corresponding bibliographic records. That is, every book on the shelf should be represented by a bibliographic record in the catalog; conversely, every bibliographic record in the catalog should represent a book on the shelf. If this is not the case, then either there are books without records or records for non-existent books. This situation, of course, can only confuse the user. At Gleeson Library from 1978 through 1990 the Catalog Department undertook in-house the ambitious project of converting all of its manual records to machine readable form, a process generally referred to as “retrospective conversion.” As it turned out about 95% of the records were converted properly, a truly excellent yield on the time and energy spent on the project. For various reasons 5% were either overlooked, not included, or could not be found in the OCLC database. Since Gleeson went online in 1991, the Catalog Department, with the help of the Circulation Department, has been attempting to identify these books and get them into the catalog. Considerable progress has been made over the last dozen years or so.

The catalog, then, enables a patron to find a particular item by title, author, subject, or class number. Other information in the bibliographic record, such as the edition statement or imprint, can enable him to refine his search and increase the degree of specificity for a particular bibliographic manifestation. Today’s online catalogs, such as Gleeson’s Ignacio, add further levels of sophistication. Now patrons can search by keyword and even combine terms from different indexes into a single search strategy. Furthermore Ignacio also tells the patron the status of items, whether they are on order, checked out, missing, at the bindery, or whatever. Recently many URLs (uniform resource locators) have been added to bibliographic records in Ignacio providing links to related electronic resources such as tables of contents, books reviews, or publishers’ descriptions, but on occasion also including full text. Not to be overlooked, a good catalog also provides an important sort of “negative” function. It should tell the user precisely what the library does not own, so he won’t waste time with futile searches.

The standard approach to cataloging, described above, accurately describes the bibliographic control exerted over most of the collections in Gleeson. There are, however, a few minor exceptions. For example, the periodicals are not classified. They are arranged on the shelf by title. This is a common practice in libraries that serve mainly an undergraduate population. This way the patron only has to know the title of a journal in order to find it; he does not have to look in the catalog and write down a call number. The government documents that are located in the documents room do not receive an LC call number. Instead they are arranged by Superintendent of Documents classification number. Again, this is a common practice for documents collections. Non-academic masters’ theses (primarily from CPS and Environmental Science) receive what is called “minimal-level cataloging;” that is, they are not assigned subject headings. All of these exceptions, however, are still in full conformity with standards set out in AACR2, MARC21, and the OCLC Bibliographic Formats.

The second most important function of the Catalog Department is to provide the bibliographic database maintenance required to insure the integrity and internal consistency of Ignacio. In addition to cataloging items as they arrive at the library, the department has to organize individual bibliographic records into a coherent file. Ignacio currently has more than 730,000 bibliographic records, more than 860,000 item records, and nearly 220,000 authority records. The extensive reliance on the use of uniform titles and authorized headings are the means by which the cataloging staff maintains the integrity of such a large and complex database. Uniform titles, for example, bring together in the catalog different manifestations of the same work. The consistent application of authorized headings guarantees that the same form of name will be used for different manifestations by the same person, and that one subject term will be chosen from among several synonymous expressions. This insures that individual bibliographic records become part of a coherent whole, thereby making the catalog self-serviceable and predictable. In addition to the vigilance required to insure that all headings added to Ignacio are authorized, database maintenance involves other activities as well. Conflicts must be resolved satisfactorily, errors must be detected and corrected, ambiguities and confusion must be eliminated. A sufficient number and kind of references must be added to the database in order to direct users to the correct headings. URLs, enhanced tables of contents, and other information must constantly be provided to increase a user's chance of completing a successful search and finding exactly what he needs or is looking for. At the Library of Congress, professional staff spends approximately 40% of their time on authority control and database maintenance. Gleeson catalogers are more fortunate; they can take advantage of all the wonderful bibliographic and authority records created by LC, so they don't have to spend nearly as much time on these important activities. Nevertheless the tedious and nearly invisible work of database maintenance is essential even at Gleeson. Without it the online catalog would be a difficult, confusing, and frustrating instrument to use, no matter how good were the individual bibliographic records it contained.

Some remarkable cataloging staff presently work at Gleeson. The following brief descriptions of who they are and what they do will highlight further the twin activities of cataloging and database maintenance which circumscribe the enterprise of bibliographic control.

Eric Paul Ewen (Head Catalog Librarian):

- *general supervision of the department;
- *original cataloging of library materials, including dissertations;
- *cataloging of print and electronic serials, and of electronic databases;
- *complex copy cataloging (as needed);
- *revision of continuations;
- *database maintenance/authority control;
- *oversight of the Jesuit Library and Archives of Modern Christian Art collections;
- *training of staff;
- *mentor for cataloging interns (as available).

Benjamin Watson (Assistant Catalog Librarian):

- *original cataloging of rare books and manuscripts;
- *complex copy cataloging (as needed);
- *revision of student cataloging;
- *retrospective conversion;
- *database maintenance/authority control.

Debbie Benrubi (Assistant Catalog Librarian):

- *general supervision of documents technical services unit;
- *training of documents technical services staff;

- *cataloging of documents in print and electronic formats;
- *cataloging of maps;
- *cataloging of non-book materials, especially videorecordings;
- *database maintenance/authority control;
- *general supervision of the gifts unit of Acquisitions.

Rob Guillen (Cataloging Coordinator (Library Assistant V)):

- *coordinates all cataloging activity and monitors departmental workflows;
- *cataloging of continuations;
- *complex copy cataloging;
- *minimal-level original cataloging of masters' theses;
- *cataloging of AMCA and off-campus books;
- *end processing of library materials;
- *maintains departmental supplies;
- *trains and supervises students;
- *book mending.

Erin Lybrand (Documents Technical Services Assistant (Library Assistant IV))

- *cataloging of government documents;
- *complex copy cataloging (as needed);
- *minimal-level original cataloging (as needed);
- *book ordering (in Acquisitions, as needed)
- *end processing of library materials.

In addition, although they are not members of the Gleeson Library Catalog Department, Ms. Karen Johnson (Systems) and Ms. Mehry Samadi (Zief Law Library) regularly participate in database maintenance/authority control activities along with Mr. Ewen, Mr. Watson, and Ms. Benrubi. It is hoped that Ms. Jessica Liu (Systems) will eventually join the database maintenance rotation.

Cataloging principles have not changed fundamentally over the years. From the "Paris Principles" in 1969 to the "Functional Requirements for Bibliographic Records" in 1998, catalogers at Gleeson have used standard metadata schemes to create bibliographical records and catalogs that are intelligible, logical, comprehensible, functional, economical, and elegant. In the future they will continue to exploit whatever schemes, resources, and technologies are available in order make their records and catalogs increasingly useful to Gleeson's clientele.

[Global Working Environment/Dependencies/Best Practices] For more than a century and a half catalogers in the English-speaking world have performed their work according to constantly evolving standard instruments adopted by national and, in recent times, international library agencies. The University Library at USF (hereinafter referred to as Gleeson Library which it was named in 1950) has fully embraced these national and international standards since at least the turn of the 20th century. Because these instruments have always represented the "best practices" of the cataloging profession, it can also be said that for more than 100 years catalogers at Gleeson Library have adhered to the highest standards in exerting bibliographic control over the collections they have been given the responsibility to organize. Indeed, the Gleeson Library Catalog Department has been an active and enthusiastic participant in all major cataloging developments that have taken place in the English-speaking world since at least the early 20th century. It is difficult now to reconstruct what professional library practices were in effect at USF prior to the Great San Francisco Earthquake and Fire of 1906 which completely destroyed the university, including its archives and records. Suffice it to say that for a long time Gleeson catalogers have

daily employed those many international standard instruments, such as AACR2, which have been recognized by leaders throughout the profession to be the most capable for providing the highest level of bibliographic control over the library's constantly growing collections. These instruments, and the international cooperative environment in which they were created, represent a major dependency for the Catalog Department at Gleeson. True, in subscribing to cataloging codes and other metadata schemes developed outside of the local institution, Gleeson catalogers have necessarily given up a great amount of autonomy. But they have gained much more in return. Imagine if catalogers at USF did not make use of bibliographic data supplied by the Library of Congress and OCLC. The Catalog Department would have to be at least three times its current size just to produce the same amount of work. Fortunately as a result of adopting standard instruments Gleeson is an active player in a vast international network of creating, exchanging, and maintaining bibliographic data. This makes the overall bibliographic products of the catalogers intelligible, economical, efficient, orderly, logical, predictable, transparent, and self-serviceable to any user who has access to the Internet. These same instruments, again as observed above, also represent the "best practices" of the cataloging profession. Those specific international instruments of bibliographic control currently used by catalogers at Gleeson are listed below.

1. Anglo-American cataloguing rules / prepared under the direction of the Joint Steering Committee for Revision of AACR, a committee of the American Library Association ... [et al.]. – 2nd ed., 2002 revision. – Chicago : American Library Association, 2002-
2. Bibliographic formats and standards. – 3rd ed. – Dublin, Ohio : OCLC, 2002-
3. Cataloging service bulletin / Processing Services. – No. 1 (summer 1978)- . -- Washington, D.C. : Library of Congress, Processing Services, [1978-
4. CONSER cataloging manual / Jean L. Hirons, editor. – Washington, D.C. : Library of Congress, Cataloging Distribution Service, 2002-
5. CONSER editing guide / prepared by staff of the Serial Record Division under the Direction of the CONSER operations coordinator – 1994 ed. – Washington, D.C. : The Division : Distributed by the Library of Congress, Cataloging Distribution Service, 1994-
6. Library of Congress. Cataloging Policy and Support Office. Subject cataloging manual. Subject headings / prepared by the Cataloging Policy and Support Office, Library of Congress. – 5th ed. – Washington, D.C. : Cataloging Distribution Service, Library of Congress, 1996.
- 7 Library of Congress. Subject Cataloging Division. Library of Congress classification schedules / Subject Cataloging Division. – Washington, D.C. : Library of Congress, 1910-
- 8 Library of Congress rule interpretations / [formulated by the Office for Descriptive Cataloging Policy, Library of Congress]. – 2nd ed. – Washington, D.C. : Cataloging Distribution Service, Library of Congress, 1989-
- 9 MARC 21 format for bibliographic data : including guidelines for content

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designation / prepared by Network Development and MARC Standards Office, Library of Congress, in cooperation with Standards and Support, National Library of Canada. – 1999 ed. – Washington, D.C. : Library of Congress, Cataloging Distribution Service, 1999.

In other ways, too, the Catalog Department has followed the “best practices” of the profession. In the late 1930s University Librarian Fr. Joseph Schechtel, S.J., made the decision, over the opposition of some administrators, to switch classification schemes from Dewey Decimal Classification to Library of Congress Classification [no. 7 immediately above]. At that time the library’s collections numbered only about 40,000 volumes, so it was eminently feasible to make the change. It is presently universally acknowledged that the LC classification is far superior for the organization of large libraries, those with collections of more than 250,000 volumes. Now that Gleeson has many more than half a million volumes, Fr. Schechtel’s decision is clearly seen to have been a very wise and far-reaching one. Today nearly all academic libraries in the United States employ the LC classification scheme. The University of Illinois at Urbana-Champaign (8 million volumes) and Purdue University (2 million volumes) are exceptions that prove the rule.

Another “best practice” employed by catalogers at Gleeson is the OCLC bibliographic utility, to which the library has subscribed since 1978. At that time there were three competing utilities: OCLC, WLN (Washington, later Western, Library Network), and RLIN (Research Libraries Information Network). Mrs. Fumiko Fowells, Head Catalog Librarian, strongly recommended joining RLIN, since she had at one time been on the steering committee of that utility’s predecessor, the BALLOTS Project. Library Dean Paul Birkel overruled her and selected OCLC [he was supported in this process by a young cataloger, later to become Head Catalog Librarian himself]. Again, like Fr. Schechtel’s decision to change classification schemes, Dean Birkel’s decision proved to be fortuitous. WLN no longer exists and OCLC has come to be recognized as the largest, most robust, best managed, fiscally most sound bibliographic utility in the world. Through OCLC catalogers at Gleeson have immediate online access to 120+ million bibliographic records as well as all of LC’s authority records. USF’s Zief Law Library still uses RLIN, which serves law libraries well, but for a general and comprehensive library like Gleeson, OCLC has no real competition as a bibliographic utility. Soon Zief will also become an OCLC customer, however, since RLIN has announced that it is merging with OCLC and will cease to exist as an independent bibliographic utility.

A final example of “best practices” by catalogers at Gleeson is the Innovative Interfaces, Inc., fully integrated, sole-source, stand alone, turnkey automated library system. This system was selected by USF in 1990 from among six vendors who submitted final proposals to a task force chaired by Dean Birkel. The selection of this particular system was not without controversy. Reference librarians on the task force wanted the DRA (Data Research Associates) system; representatives from the university’s Information Technology Services Division preferred the KeyNotis system. Dean Birkel, with the help of Mrs. Woo (Periodicals), Ms. Johnson (Cataloging), Mr. Ewen (Cataloging), and the law librarians, was able to persuade the higher administration to select the Innovative System. It turned out to be a great decision. Innovative has since emerged to become the single best turnkey library system for academic libraries the size of Gleeson. In another section of this review Ms. Johnson, now Library Systems Manager, will describe in greater detail the richness of this system, and the many enhancements it has undergone during the past sixteen years.

[Key Collaborations/Partnerships] Although the Catalog Department deals with the public only infrequently, it does maintain close working relationships with many other departments within Gleeson Library and even the Zief Law Library. Foremost among these is the collaboration between Cataloging and Acquisitions. The Catalog Department receives practically all materials for cataloging through Acquisitions. Direct orders, standing orders and other continuations, and gifts all come through Acquisitions. Only federal government documents are received directly into Cataloging. Acquisitions and

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Cataloging staff consult with each other on nearly a daily basis. Both departments rely on the same cadre of student assistants. Library assistants in Cataloging are cross-trained to perform certain basic Acquisitions functions. The Assistant Technical Services Librarian reports to both the Head of Cataloging and the Head of Acquisitions. Especially with the activity of providing bibliographic control over electronic journals and databases have the two departments integrated their operations so that they function virtually as one unit.

The Catalog Department provides some important assistance to the Access Services Department, too. For example, Cataloging collaborates closely with Access Services and Acquisitions in processing replacements for library materials declared lost or missing. The Catalog Department provides complete bibliographic control for all materials sent not only to the general stacks, but also to Reference, Periodicals, Special Collections, and Government Documents. Cataloging is responsible for keeping track of the status and disposition of serials, continuations, and superseding editions sent to the Reference Department. In addition, it provides checkin and claiming services for all government documents received on depository, including Internet versions. The Catalog Department insures that all print and electronic versions of the same serial are controlled by a single bibliographic record. Close collaboration with the Periodicals Department is required for this work. The Catalog Department works closely with the Systems Department regarding software releases, especially as they pertain to the OCLC Bibliographic Utility and the Millennium Cataloging Module of the Innovative System. The Systems Department also helps Cataloging with training issues. Finally, the Catalog Department fully maintains two small independent libraries on the USF campus, namely, the Archives of Modern Christian Art (AMCA), located in St. Ignatius Church, and the Jesuit Community Library, located in the Loyola House Jesuit Residence. Requests for books in the AMCA are paged by Cataloging staff.

So, the Catalog Department maintains a wide variety of relationships within the Gleeson Library and beyond. Cataloging staff may be somewhat invisible to the public, but they are well known by their colleagues at Gleeson and Zief, as well as by the curators at the AMCA and the Jesuit community at Loyola House. They are not totally unknown to the faculty, either, for individual faculty occasionally consult with the Cataloging staff on questions pertaining to some of the finer or trickier points of bibliographic control as it applies to items of particular interest to them. In like manner, although their work may mystify the average library user, Catalogers at Gleeson serve the public well and enhance the reputation of the library by constantly striving to make Ignacio, the online catalog, an instrument that is intelligible and easy to use. In this sense the Cataloging staff cherish their “silent” partnership with the public they indirectly serve.

[Key Challenges] Recently four issues have arisen that provide the Catalog Department with significant challenges for bibliographic control. The first deals with the practically wholesale cancellation of print journal subscriptions and the concomitant migration to electronic format. In this process the Acquisitions Department sometimes receives a suite of more than 100 electronic journals at once. These must be quickly cataloged so that access to the titles is made readily available to the library’s clientele. Furthermore, a great amount of careful editing of bibliographic records must be performed to insure that all manifestations of the same journal are controlled by means of a single record. In the most complicated cases, for example, Gleeson may have a print version and three different electronic versions (EBSCO, JSTOR, and Project Muse) of the same journal; all four versions might provide different coverage. One bibliographic record must be chosen and edited to show library patrons exactly what intellectual content the library has and which version to use to find a particular article. Indeed, creating single records for multiple versions of serials in different formats can be extremely difficult, albeit rewarding, work.

Another challenge for the catalogers is trying to keep up with authority control and headings authentication required by the huge batch loads of bibliographic records for electronic books. With cataloging activities entailing print monographs received routinely through Acquisitions, catalogers can

work on one bibliographic record at a time. They generally check their headings and load authority records as they go. Headings generated by student assistants who catalog print monographs based on Library of Congress copy—records which tend to be very complete, accurate, and up-to-date—are checked by the catalogers on a weekly basis. There are usually fewer than 500 headings on each weekly list, an amount that can be dispatched rather quickly. But with the batch loading of records for electronic books, the situation is very different. For one thing, these bibliographic records are “dumped” into the Ignacio database by the thousands, without there ever being a chance by the cataloging staff to review them, enhance them, verify any headings or correct any errors. Furthermore, even though records for electronic books are in the MARC21 Format, they are not imported from the OCLC Bibliographic Utility upon which the Gleeson Library has relied since 1978 for high quality bibliographic products. Records for electronic books are created by private companies which rely on machine generated algorithms for bibliographic content and headings; generally the process relies on very little human enterprise or professional cataloging expertise. Needless to say, there tend to be numerous errors, inaccuracies, outdated headings and other things too horrible to mention with these records. Typically a batch load for electronic books includes anywhere from three to five thousand records, which in turn generates six to ten thousand new headings for the staff to verify and authenticate. The largest batch load—for the “Making of modern law” collection—was a file that comprised 22,000+ bibliographic records and nearly 50,000 new headings. It took the catalogers at Gleeson and Zief nearly a year to plow through this huge list.

A challenge awaiting the Cataloging Department, indeed the whole profession, will be the release of the new cataloging code in 2009. As has been stated above, it is not easy to foresee how or in what concrete ways the “Resource description and access” will change the patterns of thinking and working long embraced by catalogers, but not doubt it will be a radical departure from the “Anglo-American cataloging rules” which have hitherto dominated the philosophy, principals, and practices of bibliographic control for the past century.

A final challenge, also just emerging, facing the Catalog Department is integrating bibliographic records for digitized resources into Ignacio using metadata schemes other than MARC21. Ms. Jessica Liu, the new Digital Collections Librarian, will provide leadership in this area. So far all bibliographic and authority records in Ignacio, including those batch loaded for electronic books, have been in the MARC21 formats. Such formats, however, are not standard for digitization projects. Other formats, such as the Dublin Core, seem to work better for digitized materials. The cataloging staff plans to work closely with Ms. Liu and her supervisor Ms. Karen Johnson, Head of Library Systems, to formulate policies and procedures which both effectively bring digitized materials under full bibliographic control while at the same time preserve the integrity of the Ignacio database.

[Planning and Assessment Process] The Catalog Department does not have any formal procedures in place for planning and assessment. Much of what the department does—in addition to routine cataloging and database maintenance activities—comes by way of requests initiated by other departments. The current massive weeding project, for example, was initiated by the Access Services Department when it realized that the book stacks were nearing capacity. Occasionally strategic initiatives that affect the Catalog Department are discussed in advance at Library Leadership Team meetings and are embedded in formal planning documents. Generally, however, projects that devolve to the Catalog Department are the result of situation critical events that are hard to foresee. It is likewise with assessment. Statistical reports for cataloging output as well as a count of backlogs give the staff a good overall picture of the productivity and position of the department at any given time. Because the department constantly has to react to outside pressures, it is very difficult to engage in long-range planning and assessment in any meaningful way. If incoming library materials are cataloged and other projects are completed in a timely manner, this is the best and truest indication that the Catalog Department is fulfilling its mission.

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[**Future improvements or services**] The long awaited RDA (Resource description and access) may greatly improve the usefulness of online catalogs—including USF’s Ignacio—especially since it is the first cataloging code expressly designed to meet the needs of online users and to take full advantage of recent developments in library automation. The RDA, however, is still in draft form, so it may be well beyond 2009 before it makes its appearance as a living instrument in catalog departments throughout the world. One thing that is totally under the control of cataloging staff at Gleeson is the retrospective cataloging of hitherto inaccessible library materials. It is estimated that approximately five percent of the general collections were overlooked during the process of converting manual records to machine-readable form in preparation for the implementation of automation at Gleeson. These books are regularly, though not systematically, identified by Access Services staff and patrons. The Catalog Department then adds corresponding bibliographic records to the Ignacio database when so informed of their existence. Backlogs of rare books and federal government documents, too, need to be reduced in a similar fashion. The completion of these projects will make all materials of the library readily available to patrons and interlibrary borrowers.

[**Key contributions**] So, in what important ways does the Catalog Department contribute to the overall mission of the Gleeson Library, a unit of the university, by the way, which has scored the highest on user satisfaction surveys at USF for more than ten years. In the first place, by providing the necessary and sufficient protocols of bibliographic control over the collections of the library, the Catalog Department insures that patrons can find exactly what they are looking for and everything that they are looking for. Such control makes clear both what the library has and, equally importantly, what it does not have. It is always the aim of the department to make the online catalog as self-serviceable as possible and to create bibliographic records that are economical, intelligible, and unambiguous. Secondly, by maintaining an error free database—one that is internally consistent and predictable—the Catalog Department minimizes any confusion or exasperation on the part of the user. It strives to make Ignacio a welcome and approachable instrument for bibliographical researches, whether by an incoming freshman or the most sophisticated scholar.

Chapter 10. LIBRARY SYSTEMS SELF STUDY

Submitted by: Karen Johnson, Head of Systems

OVERVIEW

The Systems office is responsible for operating and managing [Ignacio](#), the University of San Francisco libraries (Gleeson Library | Geschke Learning Resource Center and Zief Law Library) integrated online system.

Ignacio is known to most as the library online catalog. However, it is a fully integrated system which is used for most library operations. The software is provided by [Innovative Interfaces Inc.](#)

The Acquisitions Department uses the system to order and receive books. Orders are transmitted electronically. Once received and paid for, the books are sent to the Catalog Department for processing.



Complete records which describe the materials and provide access points for retrieval are entered into the system.

The Access Services Department uses the same system to check-out materials. A database of all authorized library users is maintained on the system for the purposes of checking out books and for authentication when accessing licensed databases from remote locations. You can view your library record on the system to see what you have checked out and when it is due back. Self-renewal is available if you need more time. You can opt in to have the system keep your individual reading history. You can save preferred searches and have the system notify you when new titles are received in your favorite discipline. If the book you want is checked out, you may place a hold so that the book will be reserved for you when it is returned. System generated email notices are available for those who wish to receive them. You can update your email address to make sure notices are sent to the address you use most.

For material that we don't have, you would use this system to make requests through Link Plus or through the Interlibrary Loan system. Interlibrary Loan requests are initiated through Ignacio and all Interlibrary Loan transactions are maintained on this system. You can also pass searches from Ignacio directly to Link Plus which offers delivery of requested books within three days.

The Periodicals Department also uses the system to manage subscriptions and to receive and claim journal issues. The library user can easily see which issues have been received on a check-in record for a specific title.

The system provides a variety of statistics. Some reports are generated automatically, while others may be customized by library staff. The information that is extracted is valuable for library planning in many areas.

The catalog itself contains records for all the books and journals in Gleeson Library | Geschke Learning Resource Center and Zief Law Library. Tip: Although there are a number of search indexes to the catalog (author, title, subject etc.), keyword is probably the most powerful, particularly if you are not sure of exactly what you are looking for.

HISTORY

Library Systems began in the Technical Services Dept. when a half time position was created to oversee the automation of the library and implement the library's first and so far only integrated library system. Although responsibility included managing the project and ultimately the system for both Gleeson and Law, the position was provided by Gleeson Library in 1992. By 1997 it was clear that library technology was advancing at a rapid pace and library systems become a full time job. Even as part time Library System Manager, this position had a place at the Department Heads table. When it became full time the title was changed to Director of Library Systems and ultimately to Head of Library Systems to bring it into alignment with the other department heads.

This has been a department of one for most of the years of operation. A student assistant position was added in 2000. In 2006 the part of half-time Digital Collections Coordinator position became part of Systems. The position is shared with Access Services. In 2006/2007 a Digital Collections Librarian position was created and recruited. The new librarian will begin work on July 1.

MISSION

- Maintaining the security, stability and performance of the library system
- Implementation of enhancements which improve service to the University and the efficiency and effectiveness of the Library staff.
- Initiation and management of digital collections projects.
- Support the missions of the library and of the University of San Francisco

STAFFING.

Karen Johnson, Head of Library Systems.

Jessica Lu, Digital Collections Librarian

Colette Hayes, Digital Collections Coordinator

William Chang, Student Assistant

JOB DESCRIPTION

FROM: KAREN JOHNSON
SUBJECT: DIRECTOR OF LIBRARY SYSTEMS
DATE: SEPTEMBER 21, 2007

- ◆ Holds comprehensive responsibility for operating and managing Ignacio, the University of San Francisco Libraries (Gleeson Library/Geschke Learning Resource Center and Law) integrated online system.
- ◆ Reports directly to the Library Dean in all matters related to library automation.
- ◆ Serves as chief advisor to the Library Dean in all matters pertaining to current operations and future enhancements of the integrated online system.
- ◆ Assists the Library Dean in the budget and strategic planning process as related to library automation.
- ◆ Provides management and statistical reports on systems operations.
- ◆ Installs and tests all new software releases of the integrated online system.
- ◆ Serves as liaison to all library personnel in matters related to library automation.
- ◆ Acts as the chief resource for all Gleeson Library/Geschke Learning Resource Center and Law library departments in system operations and documentation.
- ◆ Serves as liaison to Innovative Interfaces, vendor of the library integrated online system.

- ◆ Serves as the primary troubleshooter for online system problems.
- ◆ Recommends software and hardware solutions that are compatible with and complementary to the current online system.
- ◆ Recommends and facilitates staff training programs and tutorials.
- ◆ Provides staff training for new releases and updates of the library integrated online system.
- ◆ Serves as chief library liaison to the University's Information Technology Services Dept.
- ◆ Sits on other technology-related University committees and task forces and serves as Gleeson Library/Geschke Learning Resource Center's primary liaison to the University community in matters focusing on technology.
- ◆ Reciprocal backup during absences with the Reference Technology Librarian position.
- ◆ Serves as bibliographic liaison to the Computer Science Dept.
- ◆ Supervises the Digital Collections Librarian.
- ◆ Supervises the Digitization Coordinator's work in Digital Collections.

DIGITAL COLLECTIONS LIBRARIAN: The University of San Francisco Gleeson Library/Geschke Learning Resource Center seeks qualified applicants for the position of Digital Collections Librarian. This position will have an important role in a team-oriented environment to develop and manage the Library's digital collections under the direction of the Head of Library Systems. Position duties include; working with faculty and librarians in the identification of print materials to be transferred to digital media; coordination of workflow for digitizing and cataloging digital collections; cataloging and assignment of metadata to digital materials; identification of external funding sources and grant writing; coordination of marketing for digital collections; consultation with campus legal office on copyright, licensing and rights management issues related to digital collections; consultation with faculty and other producers of digital media in the creation of an anticipated institutional repository. The position will also include some bibliographic liaison and cataloging responsibilities and serve as back up in some areas of library system administration. The position will support the teaching learning and research needs of the University of San Francisco faculty and students.

QUALIFICATIONS: MLS from ALA-accredited program. 1 to 2 years of professional experience preferred with demonstrated aptitude for and interest in project planning and management, digitization standards, technical services, electronic resource management, or related areas. Preference will be give to candidates with experience using bibliographic utilities such as OCLC; integrated library systems, particularly Innovative Interfaces; content management systems such as CONTENTdm or DSpace; and metadata protocols. Knowledge of current trends in digital library development, digitization standards, long-term management and preservation, and rights management issues relating to digital materials. Demonstrated ability to work effectively in a team environment, working both independently and collaboratively, strong commitment to customer service, effective written and oral communication skills, demonstrated organizational ability and

problem-solving skills. Interest in and potential for establishing a record of professional achievement and service is required.

DIGITAL COLLECTIONS COORDINATOR:

Performs day-to-day tasks necessary to digitize (BookEye scanning system) selections of the USF Gleeson library collection.

Assists Department Head and Digital Collections Librarian in prioritizing and implementing multiple digitization projects, working with Gleeson Library staff and diverse USF constituencies.

Stays current with trends in academic library digitization and integrates this knowledge into various Library projects.

STUDENT ASSISTANT POSITION DESCRIPTION

Run the daily patron record load.

Install proprietary library software on staff machines—such as the Millennium client, Anzio telnet client, OCLC Connexion Client.

Troubleshoot hardware and software issues and resolve when possible. Document problems for reporting to USF ITS or Innovative Interfaces.

Run search statistics reports as well as assist in preparation of other statistical reports using the Ignacio system or Excel.

OPERATIONS

The software for the integrated library system runs on a server located in the Library Systems Office. Support comes directly from Innovative Interfaces, the company that provides the software. Departments using the software report problems to the Systems Office. Diagnostic assistance is provided and issues may be resolved through investigation of the user manual or other training methods. If no solution is obvious calls are opened with Innovative Interfaces and tracked until resolution. Many levels of complexity are dealt with. Sometimes bugs are identified or enhancements are requested. Problems may be resolved quickly or directed to Software Engineering which means that the problem won't be resolved until a new software release is issued.

KEY CHALLENGES

The usual suspects:

1. \$\$\$—for new products and services, professional development (a projected challenge due to a new lack of \$\$\$)
2. Time: to keep up with technology, to implement new products and services, to plan and organize.

KEY COLLABORATIONS

1. The nature of library systems requires constant collaboration with all library departments. As described in the Overview, almost all library departments rely significantly on this system for their operations and could not function without a stable secure system that can evolve to meet the ever expanding library's technology needs.

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- a. Books and journals are ordered, received and paid for through the library system. The Acquisitions (ordering, receiving, accounting) module is shared with Zief Law library. Problems that arise with this module are reported to me by staff from both libraries and I oversee the resolution of those problems. Issues vary in complexity from refining routing slips to implementation of new standards such as the 13 digit ISBN number, electronic payment of large renewal invoices, OCLC macros or functionality of the Millennium client.
 - b. Collaboration with Cataloging involves many procedures that affect the display and functionality of the library catalog. Maintaining database integrity requires vigilance and observance of standardized practices as well as being able to customize some things to optimize both displays as well as statistics generation. Coding issues—each record type in the system (order, bibliographic, item, authority, patron) has fields that coded with library defined information as well as fixed fields the contain standard coding that needs to be imported into the system. Again, since the database is shared with Zief Law Library, Library Systems must collaborate with and support the Cataloging module for both libraries. Establishing new codes must be agreed upon and implementation requires inventorying all possible ways the system will be impacted—positively or negatively. Every time that a batch of records is loaded into the system, the profile for the load is tested by Library Systems and load tables may be modified to insure the desired results. We have ongoing loads of electronic books from Ebrary and Congressional Information Service. The most recent collaboration with Law in this particular venue regarded the transition by the Law Library from RLIN to OCLC as provider of the records they import into the system. We needed to insure that their records would remain unique. Although we share the same catalog database, our records are not merged and both libraries wished to continue that model. In addition modifications to the bibliographic and order load tables were needed to load the new Law records appropriately.
 - c. Gleeson Access Services, Zief Law Library and the Regional Libraries all use the Circulation module. Material is checked, checked in, held for pick up and renewed. Notifications are sent for holds, ILL and Link Plus pickups. Courtesy notices and overdue notices are also generated with this system. This module is quite complicated due to the idiosyncratic nature of circulation procedures. While it is true that there are national standards that govern many areas of librarianship, prior to automation, circulations procedures in libraries tended to be developed locally. Even with automation, there are a lot of elements involved in profiling and maintaining an efficient system. There are many elements that are called into play for any given circulation transactions. A simple check out of a book calls into play the following parameters: location (we have 157 branch locations) item (we have 28 item types), patron (we have 37 patron types) and loan rules (we have 56 loan rules). Then factor in the calendar of days closed, hours open and the table of patron blocks. When something fails, this complex matrix of components is where analysis begins. Management of holds is also part of the Circulation module and patron self-requesting of material is a feature of the online catalog, so problems from either end of that process are referred to Systems. Course Reserves—electronic and print are managed within the Circulation module and served to the user from the library online catalog. I collaborate frequently with the Reserves Coordinator on matters relevant to the operation—both function and performance. LinkPlus and Interlibrary Loan operations are services that are managed through the Innovative system. I am often called upon to resolve anomalies and interpret functionality. Systems will be an integral part of the implementation of E-Commerce and Illiad and will consult on the implementation of laptop lending.
 - d. Much of the collaboration with the Reference Department is focused on the online catalog content and functionality and on the web services that are offered to the public through the catalog. Services offered through the catalog include the ability to establish preferred searches and receive notification when books on preferred topics are added to the

collection; opting in to saving one's reading history; placing holds. Troubleshooting the initial implementations included input from some helpful Reference librarian. In fact there has been extensive collaboration on the implementation of services like Metafind—a federated search engine, Webbridge, a link resolver, Web Access Management, an authentication system and currently on the redesign of the web catalog. All these products and projects require ongoing collaboration to insure that they continue to function properly and to identify ways in which to improve them. Zief Law library also provides input library catalog collaboration. The creation and ongoing management of the electronic classroom was also a joint collaboration with the Bibliographic Instruction Coordinator, the Head of Distance Learning Services and the Reference Technology Librarian.

2. Zief Law Library shares the library system and there is constant collaboration in reporting of problems or implementation of new services. In addition to all the instances mentioned above, I have also consulted with them in other areas such as evaluation of electronic classroom functionality and maintenance.
3. Information Technology Services provides the infrastructure that makes the Library Systems operation possible. Serving on the University Information Technology Committee and subcommittees facilitate communication and collaboration that allow us both to provide services that complement each other. At the moment we are working on a project to allow Single Sign On through the campus portal to integrate library services. We expect to collaborate with ITS on the implementation of a Digital Repository if and when the University approves the initiative that we plan to propose as part of the Digital Collections component of Library Systems. They have supported us by folding server replacement into the University replacement cycle. As a result, we recently acquired a new Sun server which will insure that we will be able to take advantage of software updates from Innovative Interfaces. Another example of close collaboration is in the management of the kiosk stations. ITS helped develop a management strategy and profile for these dedicated machines and troubleshoots them promptly when they act up. There is such a constant symbiotic relationship that it is not possible to articulate every collaboration or to imagine any way to survive without their assistance.
4. Consultation with peers at other institutions that use the same products that we use is a common practice. It is better to benefit from those who have trodden the path before than to reinvent the wheel. As veteran users of the Innovative system, USF Library Systems serves more often as a resource for other librarians. We have hosted folks from around the Bay Area and from all over the world. We have provided advice to prospective Innovative customers, assistance to new users and compared notes with peers. Most recent visitors were from the University of Wales, Bangor, and the Peninsula Library System. In the past we have had folks from Hong Kong, Shanghai, Taiwan, South Africa, Chile, Australia, New Zealand, United Arab Emirates, San Francisco City College, San Mateo Community College, and Diablo Valley Community College.
5. Participation in user groups has benefits in that we gain a lot of information about how other libraries implement products and services that come from the same vendors that we use. The Innovative Users Group is particularly valuable in that it is very well organized and has the most practical job related conference of any professional organization. There is an added benefit of raising the institution's profile by the recognition of participation as an officer of the organization. The Northern California Innovative Users Group is also valuable in providing a forum where more local users can get together and share war stories. Since the ILS vendor is also local, they are able to send more of their staff to local venues. The Head of Library Systems served as chair of the Northern California Innovative Users Group for about 6 years which meant organizing each annual meeting pretty much single-handedly, and on the Steering Committee of the International Innovative Users Group for 5 years 3 of which were Vice Chair, Chair and Past Chair (a role that never ends).

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KEY CONTRIBUTIONS TO SERVICE, LEARNING AND SCHOLARSHIP AT THE UNIVERSITY

1. Participation on local and university-wide committees provides valuable service to the university. Membership on the University Information Technology Committee and two subcommittees of that group allows Library Systems to current with and contribute to the direction of technological developments at the University of San Francisco.
2. The Head of Library Systems serves as liaison to the Computer Science Department in matters of collection development. The Digital Collections Librarian will receive an appropriate assignment.
3. Diligence in providing a stable technological environment is perhaps the highest priority. Implementation of enhancements to software and hardware with little or no disruption in service has been quite successful.

PLANNING AND ASSESSMENT PROCESS

1. It is important to establish attainable goals without sacrificing a desired level of progress. Goals are necessarily influenced by the availability of resources for acquiring and implementing new technologies and priorities are established based on what is realistic for a small systems department at a medium sized university. They are also tailored to align with stated goals and objectives of the university. See sample of proposed goals and objectives, many of which have been adopted. Attachment.
2. Routine reports are produced periodically and customized reports are produced on demand. Many reports can be generated automatically—search analysis, circulation statistics, orders sent, financial reports etc. Customization and scheduling of reports is available.
3. Keeping abreast of what is possible and determining what is appropriate for this environment is important. Conference attendance, online feeds, user group lists are all part of maintaining an informed Systems Dept. Comparing notes with peers provides assistance and reassurance in determining the appropriate paths to pursue.

FUTURE IMPROVEMENTS OR SERVICES

1. There are plans to allow fines to be paid online through Ecommerce. This will involve collaboration with Access Services, Innovative Interfaces and Verisign.
2. A project to allow single sign on to library services through the campus portal is being testing and is nearing a solution.
3. A new product and new server will be installed later this year to run Web 2.0 applications. The discovery platform Encore will provide a new platform for searching and finding information. Additional products will be incorporated into this platform. In addition a replacement server for the current system was installed this summer.
4. Processes for giving the online catalog a facelift are underway. A new keyword relevance piece and spell checker were recently installed. The spell checker includes English, German, Spanish languages and both legal and medical thesauri. A committee composed of members from Gleeson Reference, Technical Services, Systems and Law is collaborating on refreshing the rest of the webopac.

5. The bibliographic utilities OCLC and RLIN are merging which may have ramifications for Gleeson and Law Libraries. Law uses RLIN and Gleeson uses OCLC. Close monitoring of records imported into the system will be necessary.

USF Strategic Goals 2005-2010	Technical Services Strategic Goals 2006-2007	Measurement	Responsibility
Promote collaboration across all areas and departments of the University to offer more integrated learning experiences to students	Prepare for the ramifications of the merger of OCLC and RLIN	Preservation policy for managing the database in the light of the impending merger.	Technical Services staff from Gleeson and Law and Library Systems.
Advance construction and technology infrastructure projects, focusing on the immense good to be achieved rather than on the inconveniences to be endured during the interim.	Prepare web opac for facelift to provide a cleaner interface for access to library resources and services available through the catalog.	Implementation of the new interface.	Library Systems with participation from other appropriate library staff from technical and public serves and Law.
Advance construction and technology infrastructure projects, focusing on the immense good to be achieved rather than on the inconveniences to be endured during the interim.	Implement the pilot project for the electronic submission and storage of the Ed. D. dissertations.	Selected Ed. D. dissertations submitted to the library in digitized form beginning in May 2006 according to protocols established by the committee.	Digital Collections Committee, Karen Johnson, Chair
Advance construction and technology infrastructure projects, focusing on the immense good to be achieved rather than on the inconveniences to be endured during the interim.	Implement Edifact ordering to accommodate the change of the International Standard Book Number from 10 to 13 digits.	Successful adaptation of the new numbering system in ordering, cataloging, indexing and retrieval of records.	Karen Johnson, Eric Ewen, Kathy Woo
Advance construction and technology infrastructure projects, focusing on the immense good to be achieved rather than on the inconveniences to be endured during the interim.	Enrichment of the library catalog and improved access to library resources.	Implementation of federated search engine, added web options and services to the catalog, added content such as book jacket images, book reviews.	Karen Johnson in collaboration with members of other departments.
Advance construction and technology infrastructure projects, focusing on the immense good to be achieved rather than on the inconveniences to be endured during the interim.	Explore the possibility of providing digital repository services to the University of San Francisco	Investigation of products available and resources necessary to manage a wide variety of digital content.	Digital Collections Committee, Archives and Information Technology Services.



AJCU Archives Project

Sherise Kimura attended a meeting of 19 AJCU libraries in Sept. 2005 to consider the development of a consortial digital project that would draw upon the unique, archival collections of the association's libraries.. A proposal for the formation of an AJCU Pilot Digital Consortium involving archival collections was drafted and presented to the AJCU Library Deans' Executive Committee. In March 2005 a subcommittee composed of Sherise Kimura, Shawn Calhoun and Debbie Benrubi planned to select 45 USF images to contribute to the project. Using the three broad categories recommended in the proposal (the unique spiritual and learning environment provided to all students at AJCU institutions; the focus on social responsibility at AJCU institutions; and the Jesuit heritage of each of the participating ACJU institutions) Sherise identified subcategories and divided them among the subcommittee members. The subcategories, or newly created categories are University history, Buildings, Jesuit Involvement, Academics (faculty and students in the classroom), Student Life, Community Service, Ricci Institute, and the Rare Book Room. Sherise consulted Fr. Kotlanger on the best approach to find images and he suggested looking at Alan Ziajka's recently published, *Legacy and Promise: 150 years of Jesuit education at the University of San Francisco, The University of San Francisco* with photographs by Phil Schermeister, and yearbooks for selected years. In the summer, Colette Hayes started in her position as digitization specialist and took over Shawn's selection areas. The committee will finalize selection of 45 images by the end of September.

It is not known exactly when the AJCU consortium will be ready to accept the USF images for the pilot project. The consortium has not decided on a host institution for the project yet. Once the host institution is identified, the Metadata Subcommittee, made up of participants from the Marquette meeting, will need to recommend technical specifications for scanning images and provide guidelines for descriptive cataloging.

Electronic Submission of USF Doctoral Dissertations

Meetings were held with representatives from the School of Education. Committee participants in this project are Debbie Benrubi, Eric Ewen and Karen Johnson along with assistance from Kathy Woo. Ultimately there was an agreement to engage in a pilot project with submissions for this year being voluntary. Submissions will be made in Word and PDF to an email account. We will retrieve the submissions, catalog them and link the pdf to the bibliographic record. The plain text will be scanned into software that will index the full text into a section of the Ignacio database. So far there have been no voluntary submissions. Debbie Benrubi has worked with Janet Snyder to establish guidelines that will be given to all doctoral candidates. We should get electronic submissions this winter. In addition the copyright release form has been redesigned to ease restrictions on publication and access.

Proquest Dissertation Digitization Project

We have contracted with ProQuest to digitize 1305 doctoral dissertations from 1978-1996, currently held by ProQuest in microfiche. The cost is \$15.00 per title.

We are planning to include the embargoed dissertations that we had not previously sent to Proquest. We will look into contacting the authors of the embargoed dissertations in order to obtain permission to publish with Proquest and to offer full text via our library catalog. There are about 40 of these and the cost of filming will be about \$45.00 per title.

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Scanning USF Master's Theses

Colette Hayes has been working with Karen and Eric to establish the workflow for scanner the master's theses. We have agreed on the following parameters:

Implement immediately:

Begin with the computer science theses.

Scan texts in grayscale, inserting a white page in between in order to eliminate bleeding.

Name pdf files according to the following: author's last name/first five words of the title/date.

Spell check the text document, correct all mistakes, and save before submitting files for review.

Some other issues are still undecided:

Remove call number notation from scan.

- To use or not to use an "Information to Users" page

- To use or not to use "User Notes" pages

- Should we cut out signatures from signature page

- Should we cut out copyrighted material that is not the author's, and how should that material be identified.

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Media Keyword Index

Purchased Document Indexing from Innovative Interfaces. Karen has tested the product and it works more or less as advertised.

Issues are that indexed material resides in a separate part of the keyword index and the search parameters are not the same as the Advanced Keyword product. Presentation and education on the use of this for dissertation retrieval are needed. Even so being able to search the full text of our dissertations will be a great added benefit.

Institutional Repository

Members of the committee researched various products and implementations of institutional repositories. We have concluded that open source solutions are neither free nor inexpensive to implement. We have also been watching the directions that others are taking. Strongest among those that seem most appropriate for us are Content DM from OCLC and Symposia from Innovative Interfaces. Pricing on the latter is known to be quite high and Content DM seems more widely deployed. However any institutional repository initiative will need to be adopted university wide.

Other

Members of the committee have attended special programs and workshops related to trends and projects in digitization. Debbie Benrubi attended a SCELCL Focus Group on digital collections and provided an insightful report on the issues all libraries are facing. Debbie and Karen attended OCLC sponsored programs at ALA Midwinter 2006. At the Innovative Users Group in May 2006, Debbie organized a Birds of a Feather meeting that she, Sherise and I attended. We had a very interesting and illuminating discussion there and made some very good connections. We also attended programs about projects that are already underway.

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Chapter: 11 Archives

Submitted by: Fr. Michael Kotlanger S. J., University Archivist

Historical Overview: The University of San Francisco Archive Room was established in a large store room on the main floor of the new Gleeson Library building in 1951, when the late Fr. John B. McGloin, S.J. (History, University Historian) was appointed by the California Provincial Superior of the Society of Jesus to serve as Archivist. From 1951 until his retirement in 1985, Fr. McGloin, S.J. collected the basic printed materials, books, catalogs periodicals (all the available published record of St. Ignatius Academy/Saint Ignatius College/University of San Francisco) that are now contained in the present Archive Room collection.

The current Archivist Michael Kotlanger, S.J. was appointed to the post in 1985 and charged by then Fr. President John Lo Schiavo, S.J. with developing an institutional archive collection as rapidly as possible. The president feared that too much of the official university historical records/files were being lost whenever new administrators came into office in the institution. From 1985 to 2005 the archivist collected the retired office files of the Trustees, Office of the President, Vice-President of Academic Affairs, as well as papers of assorted departments and faculty members. As the collection grew in size from 400 linear feet in 1985 to 3800 feet by 2005, the Archive Room was several times relocated to new space before arriving in several storage rooms in the northwest corner of the basement of the library building. The Archive Room still occupies a portion of the space.

In 2005, the university administration committed the institution to an aggressive campus buildings upgrade program and new buildings construction projects. As plans were developed many offices were suddenly displaced and needed to be relocated. A decision was made by top administrators to use the basement storage area of Gleeson Library to house the Academic Services Offices. All the collected files of the university divisions as well as the papers of the USF Faculty Association that were held in the University Archives storage rooms were removed from the facility and sent to off campus storage sites. Control of the papers was returned to the offices where they had originated. As a result nearly 3400 linear feet of collected material was removed from the archive room and storage areas and the total collection greatly reduced in size to circa 580 linear feet of material. In only a twenty year period the archive collection had come full circle.

At the beginning of AY 2007-2008 the USF Archive Room occupies a 32'x28' room in the library basement. The room is well lit and has a research table for visitors, a work space counter with sink, and a desk area for the archivist. The room contains a variety of materials pertaining to the history of the institution since its foundation as Saint Ignatius Academy on Market Street in 1855. The majority of the collection items date from after 1906, (at which time the institution lost all its buildings, libraries, laboratories, and their contents in a major earthquake and fire storm). The Archive Room collection contains Jesuit published catalogs, periodicals, and materials pertaining to higher education. On the shelves are student sponsored annual books, the San Francisco Foghorn student newspaper, student literary publications, general university catalogs, commencement

programs, student handbooks, sports programs, alumni association publications, university fund drives promotional materials, architectural plans, photographs, and ephemera from general university life and the president's office are available for viewing or research purposes in the archives. The collection holdings are arranged into 8 major record groups. There is a small collection of printed catalogs, plus some yearbooks and student publications that originated in the former San Francisco College for Women/Lone Mountain College. Public records of the university's Labor-Management School (1946-1976) program are also available to researchers.

Mission and Goals: The mission of the University Archives is to collect, store, maintain, and make available to researchers the public record of the institution including all official publications and printed materials of the public record generated by the school, the historical photograph collection of the institution, as well as ephemera of historical significance. The goal is to provide current and future researchers with sufficient data to develop the broadest and most accurate view of university life, activities, and programs since the school was established in 1855.

Data of Evidence:

#1 University of San Francisco Archives – Annual Report: 30 June 2004-1July 2005

Michael Kotlanger, S.J. – University Archivist

Gleeson #12

(415) 422-5932

M-F: 2:00 P.M. – 6:00 P.M. or By Appointment

kotlanger@usfca.edu

During AY 2004-2005 the University Archivist attempted to meet the objectives stated in the Gleeson Library/Geschke Resource Center Mission Statement. The greatest levels of achievement occurred in the areas defined by Points #1, 3, 4, 5, and 8. The acquisition of archival shelving in the Archive Storage room #11 has heightened the level of safe storage for much of the collection of historical papers. Some advancement took place in Point #2 as Ms. Debbie Malone continued working to organize the Gleeson Library/GLA/Symposium/Fr. Monihan Papers into an easily usable Record Group for researchers. Any progress in the areas defined by Points #6 and 7 remains slow largely because the Archivist position is a .5 FTE staff position. The objective of developing a “virtual library” collection of archival materials will entail an increase in staff, intensive training, and a continual upgrading/renewal of equipment to prepare the materials in the collection for use in a digitized, electronic, universal, *biblioteque*-system. The following data is offered in support of the above statements.

- Weekly hours of operation: **20**
- Average: Monthly “Drop-in” visits; **19.75**
- Average: Monthly e-mail/telephone/postal inquiries **35.08**

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The number of visitors to the Archive Room as well as inquiries to the archivist fluctuated by the month. During fall and spring semesters when large numbers of faculty and students were on campus for classes the “user” hours were at their highest. During winter holiday, Intersession, “spring break,” Friday afternoons the numbers of users of the unit dropped off precipitously. Because of the university preparations for celebrating the 150th anniversary of the institution, user numbers during the three summer sessions of 2005 increased noticeably over previous years. The number of electronic inquiries remained high all year.

- Primary Institutional Users of Archive Collection AY 2004-2005: **55**

Offices of; the President; Board of Trustees; provost-Vice President-Academic Affairs; Vice President-University Advancement; University Chancellor; Vice President of Special Programs; Saint Ignatius Church; University Ministry; Zief Library-School of Law; Department of Athletics; School of Nursing; School of Business Administration and Management; College of Professional Studies; Department of Visual and Performing Arts; Department of Modern Foreign Language; Media Affairs; University Publications; Vice President of University Life; Fromm Institute; Leo McCarthy Center; Lane Center; Sesquicentennial Planning Committee; Rector-Loyola House; Faculty Association; Dean’s Office-Gleeson Library.

- Primary Non-Institutional Users of Archive Collection AY 2004-2005: **18**

Dionysius Rabbon (Molokai, HA)-USF football program 1960s; Arthur Thatcher (Los Angeles, CA) Fr. Joseph Keane, S.J.-Teacher, Chaplain, Athletic Moderator; John Edward Powell (Bakersfield, CA) Henry Villalon-Architect; M.M. Parden (Hillsborough, CA) Edward J. Morrissey-student Saint Ignatius College; Bill Russell (Larkspur, CA) Henry Clay Hall Chair of Organization and Management School of Education; Louise Kalshar (Cambria, CA) Joseph Koret Papers; Diane Marcus (Novato, CA) Samuel Berger-Master Carver of Stations of the Cross, Xavier Hall- Sacred Heart Chapel, University of San Francisco; Kate Alderman (San Francisco CA) Florence McAuliffe “graduate” and benefactor St. Ignatius College/USF; Eileen Wilde (San Francisco, CA) Carpenters Specifications Book-1926 and Campion Hall Construction Photographs; William Doty (Kansas City, KA) 1950s “The Cables” USF singing group signs with RCA Records.

- Visiting Scholars-Users of Archive Collection AY 2004-2005 **20**

Faculty/Staff/Doctoral Candidates: Universidad Catolica Andres Bello (Caracas, Venezuela); University of Dayton; University of Hawaii; Ohio State University; Santa Clara University; University of Memphis (nee, Memphis State University); St. Joseph’s University (Philadelphia PA); University of Paderhorn (Germany); University of Minnesota-Twin Falls; University of California at Los Angeles; University of San Francisco; Pontifical Gregorian University (Rome Italy); Northern Michigan University; Pennsylvania State University (State College, PA); University of Wisconsin (Madison, WI).

- Faculty/Staff-Users of Archive Collection AY 2004-2005 **50**

Dr. Alan Ziajka-Special Programs; Bill Hogan-Athletics; Peter Novak-Fine and Performing Arts; Thomas Lucas, S.J.-Fine and Performing Arts/USF 150 Committee; Kern Tremblath-Dual Degree Program/CPS; Bill Henneberry-Athletic Advancement; Todd Kerr-SOBAM; Laura Keady-Saint Ignatius Church; Sandra Lofgren-University Advancement; Hilarion Potawaran-Office of the President; Shannon Macmillan-Evans-Provost/VP Academic Affairs; Grace Sanchez-Office of the President; Jack Treacy, S.J.-Rector/Loyola House; Annette Anton-Alumni Relations; Roberta Romeo-School of Nursing; Dr. Albert Huerta-Modern Foreign Language; Glori Simmons-Thatcher Gallery; Hannah Crutcher-Athletics/150 Legends Project;

Michael Lehmann-Economics/USFFA; Alan Heinemann-English/USFFA; Mark Rocanova-Facilities Management.

During AY 2004-2005 the Archive Room continued to attract a variety of users from within and outside the institution. The steady pattern of decline in genealogical researchers using the collection, that has marked the period since 9-1-01, continued. The genealogists were replaced by university sponsored researchers preparing manuscripts for the university, high school, church, School of Nursing, USF Faculty Association, Athletics anniversaries in 2005 as well as some new fund raising initiatives. Numerous interviews were provided to students (USF et. al.) on subjects related to USF and San Francisco history. Several times during the AY researchers from ESPN-Sports Television called seeking information or interviews and illustrations about past performers in the USF athletic programs. The archivist devoted considerable time to working with Dr. Alan Ziajka [Legacy & Promise: 150 Years of Jesuit Education at the University of San Francisco (2005)] and Mr. Paul Totah of St. Ignatius College Preparatory [Spiritus Magis (2005)] to complete the texts and locate/scan quality illustrations to meet publisher's deadlines. The archivist also devoted much time and effort to collaborating with the Sesquicentennial Committee in preparing different aspects of the 150th anniversary celebration of University of San Francisco.

- Archive Acquisitions AY 2004-2005: 48 linear feet
- Total Archive Holdings 30/06/04: 3,767 linear feet

Total USF Archive Room Holdings 30/06/05 3815 linear feet

#2 University of San Francisco Archives – Annual Report: 30 June 2005-1 July 2006

During AY 2005-2006 the University Archive Room underwent a drastic downsizing in storage space and the size of collection. Due to university office space needs administrators made the decision to convert all the archive storage space and work area in the northeast corner of the library basement to Academic Services Offices. The majority of papers held in special secure storage on new archival shelving in Gleeson #11 were removed to off campus storage in October. The collections removed totaled c. 3,190 linear feet of materials. The transfer included the majority of boxed materials collected since 1984 and held in RG 2-Board of Trustees; RG 3-Office of the President; RG 4-Office of the Provost -Academic Vice President; RG 8-Gleeson Library (as well as, Gleeson Library Associates/Fr. William Monihan Papers); Closed Legal Case Records-Office of University Counsel; Labor-Management Office-Case Records; Papers USF Alumni Association; and the Papers of the University of San Francisco Faculty Association. The university intends to implement a records management program in the immediate future for all divisions. The University Archivist is to handle only non-current/decommissioned historical records of the university. Despite a large amount of time given to readying the various collections for removal to storage, the University Archivist was able to meet the objectives stated in the Gleeson Library-Geschke Resource Center Mission Statement. The greatest levels of achievement were attained in

the areas designated by Points #1, 4, 5, and 8. Some advancement took place in the area defined by Point #2 as the archivist learned new research techniques and uncovered numerous new sources for information via the internet. Progress in the area defined by Point #6 remains slow because the Archivist position is a .5 FTE staff position. The possibility for rapid advancement in achieving the mission goal described by Point # 7 has increased with the hiring of a Digitization Coordinator as well as the acquisition of sophisticated digital scanning equipment. The archivist and coordinator held preliminary conversations about preparing the university photograph collection for inclusion in the AJCU Photograph Archives. Point #3 of the mission statement is the area where the unit regressed this past year. The following data is presented in support of the above statements

- Weekly hours of operation: **20**
- Average: Monthly “drop-in” visits; **18.3**
- Average: Monthly “e-mail/telephone/postal inquiries” **29.91**

The number of visitors to the Archive Room as well as the amount of inquiries about information sent to the Archivist fluctuated by the month. During fall and spring semesters when the maximum numbers of administrators, faculty, staff, and students were present on campus the “real and virtual” user hour totals were highest. During winter holiday, Intersession, “spring break,” summer session(s), and Friday afternoons, the number of users of the facility dropped off precipitously. This use pattern has been fairly constant for the past decade. Summer Session(s) 2006 however, marked an all time low in Archive Room usage largely due to the isolation of the unit in the basement because of an elevator renovation project and lack of signage in the upstairs hallway. The multiple construction projects on the lower university campus have resulted in far fewer students using the library facility during the summer. The preparations for the 150th Anniversary of the foundation of the university celebrations saw the completion and publication of Dr. Alan Ziajka’s Legacy and Promise (2006); Paul Totah’s “Spiritus Magis” A History of Saint Ignatius High School (2005); Hannah Crutcher (ed.) Legends of the Hilltop (2005); and Dr. Roberta Romeo’s manuscript History of the USF School of Nursing. All of these above works were heavily illustrated with photographs held in the USF Archive Room Photograph Collection. The archives provided artifacts of university ephemera and more photographs for the historical displays gathered and organized by Dr. T. Lucas and G. Simmons in the Thatcher Gallery. The archivist worked with Dr. Eugene Muscat (SOBAM) as he organized various events, programs, recordings, and publications for the sesquicentennial celebration. Since the closure of the celebration in June 2006 the number of historical interest researchers has slowed considerably.

- Primary Institutional Users of Archive Collection AY 2005-2006: **60**

Offices of the: President; Board of Trustees; Chancellor; Provost-Academic Vice President; University Advancement; University Life; Rector-Jesuit Community-Loyola House; University Ministry; Special Programs; Registrar; Dean-SOBAM; Dean-CLAS; Dean-SON; Dean-Gleeson Library; Alumni Relations;

found in a storage closet and sent to the archivist. Materials collected from alumni for the 150th anniversary were given to the Archives by their owners. An important collection of photographs of Saint Ignatius Church and the campus environs also arrived during AY 2005-2006.

- Archive Acquisitions AY 2005-2006 21 linear feet
- Total Archive Collection Holdings 07/01/05 3815 linear feet

Total USF Archive Room Collection Holdings 07/01/06 577 linear feet

Operations: The University Archivist holds a .5 FTE salaried position. The archivist is a nominal member of the Library Leadership Team. The Archive Room is open to the public 20 hours per week, from Monday through Friday between the hours of 2:00 P.M. to 6:00 P.M. The archivist loosely follows standards recommended by the National Archives and Records Administration for operating a small scale, low budget institutional archive unit. There is no official library budget entry for the archive room. Archive equipment and material purchases are funded through the Office of the Dean of Libraries.

The university celebrated the sesquicentennial of its 1855 foundation in 2005. During the three years before the celebration the archivist collaborated with Dr. Alan Ziajka (Office of Special Programs) in the writing of the official university history. All the documents and materials in the archive collection as well as the historical photograph collection of the university were used in preparing the volume Legacy and Promise for publication. At the same time the archivist collaborated with the author of the official sesquicentennial volume Spiritus Magis that recorded the history of Saint Ignatius College Preparatory that spun off from University of San Francisco in 1959. The athletic department of the university celebrated its 75th year of operation in 2005. For the occasion a commemorative volume focused on the top 75 athletes of the university was prepared. The archivist assisted the editor/author Ms. Hannah Crutcher (Athletics) with research as well as provided photographs of all the outstanding athletes who were covered in the volume.

Organization: The University Archivist works under the direction of the Dr. Tyrone Cannon Dean of Libraries. There are no other staff employees or student workers assigned to the section.

Key Challenges: Archivists world wide claim that their greatest need is always more space to adequately and safely house the collection for which they are responsible. This is also the case at University of San Francisco. Recently a library program was started to electronically digitize the San Francisco Foghorn student newspaper holdings and put the entire collection on line for researchers. Such programs in the future may lessen the constant need to expand storage space.

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Key Collaborations with other campus departments/units and within the library:

The archivist works regularly with the reference desk personnel in dealing with questions about the history of the university. The San Francisco City Directory book collection in the reference section is a major research tool that the archivist uses regularly in dealing with genealogical inquirers. The microfilm collection of local newspapers in the Periodicals section of Gleeson Library as well as the extensive state and local journals that the section holds is another major source of support for any archival research. The workers at the Circulation Desk assist the archivist in hosting researchers who can only come to work on weekends or before/after regular archive room hours. Visiting researchers who arrive to use the archive collection have always been welcomed and assisted by the professional staff and student workers. The Government Documents librarians, as well as the Interlibrary Loan specialist have continually assisted the archivist to locate and acquire rare printed materials from elusive sources and data bases that were needed for several recent research projects. The Rare Books and Manuscripts Room librarian graciously provides access to materials to archive room researchers. In general the Archivist is generously supported by all sections of the library operation and attempts to support those same sections in return. The three major users of the Archive Room collection have been the Publications/Media Office, Athletic Department, and Alumni Association. Until 2005 the executive secretary of the University Trustees and the secretaries in the President's Office and the Office of the Vice President of Academic Affairs regularly called upon the archivist to retrieve old records needed in university planning.

Key Contributions to service, learning, and scholarship at the university:

Each semester for the past two decades the archivist has provided interviews to students in media and communications classes, journalism courses, history classes concerning the history and development of the university. More recently the archivist has collaborated with the Admissions Office to train the University Ambassador student group about the history of the school and various points with which to "sell" the university to potential applicants. Whenever the Alumni Association prepares a major reunion gathering or special presentation the archivist is called upon to supply the historical memorabilia and photographs for the gathering. The archivist also works regularly with the Office of Special Programs on projects pertaining to the history of the school.

Future improvement goals:

Continue the process of digitization of the archive holdings. Increase the archive room space for future collection development. Acquire special document storage cabinets to house the historical university building plans. Encourage the greater use of the archive room collection by students and faculty researchers.

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Chapter 12. Library as Place

Submitted by: Locke Morrisey, Head of Collections, Reference & Research Services

Sense of Place

Physical-- The Head of Access Services acts as the Facilities manager for the building. Library space is very important to the faculty, students and the entire campus.

Shortly after the opening of the Geschke Learning Resource Center the campus was looking for additional computing space for users. Information Technology Services (ITS) was allowed to create two computing spaces in the library, one along the north side of the 2nd floor and another on the northeast side of the 1st floor of the library. In addition, ITS has student “lab monitors” placed in those spaces to assist students and has recently placed regular staff members there for night and weekend technical support for the entire campus.

Group study rooms were created with the addition of the Geschke Learning Resource Center and soon became extremely popular with students. Additional group study rooms were created when the Gleeson Library was renovated in October 2003 but the demand is still there for more group study space as was confirmed by the LibQual+ 2006 results.

The 1st floor of the library has an Electronic Classroom with 24 user stations and an instructor’s podium. The library also has a separate “collaboratorium” on the lower level which was to be used for library-faculty group projects and study space but due to a campus-wide need for classroom space has been used recently for regular instruction by a number of departments. In recent years the collaboratorium has been used as a regular classroom to help with the classroom shortage on campus due to renovations of older buildings. The library also partners with the campus Learning and Writing Center giving space on the 1st floor on weekday afternoons for student drop-in assistance.

With the renovating of older buildings, faculty have been displaced. The library has had its 4th floor gutted and redesigned for displaced faculty office spaces in June 2005. The thesis and dissertation collections on the 4th floor have been moved to the lower level of the library. The overflow Reference Annex collection on the lower level of the library has been moved to offsite storage.

Mary and Carter Thacher Gallery was created on the first floor of the library when the Geschke Learning Resource Center was opened. It has roughly 3,750 square feet of exhibition space with a circular central gallery and entry that is 42’ by 72’ and two 66’ by 10’ corridors extending from the central gallery. The 10’ walls are equipped with a sophisticated wire hanging system. Its location in the Gleeson Library/Geschke Center allows for an atmosphere similar to a public art space. It has 4-5 different exhibits per year and a reception at the opening of each exhibit. The Curator of the Gallery is a member of the Visual Arts department.

University Archives are in the lower level of the library. It is administered by a part-time Jesuit. A Gleeson/Geschke librarian has worked with the archivist to improve preservation and access to the collection. A large portion of the Archives storage space was lost recently due to the move-in of the Academic Services department in fall of 2005.



Social/Cultural/Learning Space

With the availability of personal computing, technical support, art gallery, and classroom space, the library is a focal point of campus as a sociocultural learning space. Students, staff and faculty often find themselves in the library as a comfortable, welcoming place where they can study, network, teach and learn.