

Administration

Annual Report 1998 - 1999

Z. Smith Reynolds Library
Annual Report
1998 - 1999

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OVERVIEW

The Z. Smith Reynolds Library has just been ranked #4 among the nation's great university libraries by the Princeton Review, an online publication of dubious merit! This provoked some laughter and a more serious response: deep thought about what makes a library great and how we can strive toward "greatness." At some universities this would not be a pertinent question, but at Wake Forest, where we continue to pursue the highest goals in teaching and learning, this is an important concern. There are no great universities without great libraries. This brings us back to the definition we must create anew, in this age when the biggest is not necessarily the best, and when ready access to the world's information via digital networks brings more information to our campus than could have been provided by the libraries of Harvard, Yale and Illinois combined 20 years ago! We are looking to our staff, to our mastery of digital information, to our continued

development of relevant programs and collections, and above all to our personal approach to meeting user needs for instruction, guidance and information resources. We are strong, but we can continue to approach greatness!

In 1998-1999 we broke with tradition, staying open during the Christmas break to meet the expressed needs of faculty and graduate students. Although a departure from custom, it was congruent with our approach, which supports experimentation and embraces change.

Our reorganization was continued with the creation of a fifth team, the Technology Team, to bring together the disparate aspects of web pages, hardware, software, networks, new administrative applications and training. This was also the year that ushered in Endeavor's Voyager system and saw the end of Dynix as the library's major system; NC-LIVE has added to the rich mix of options for our students and faculty, contributing many databases at substantial savings. "Hits" on our databases were up 42% to 234,114!

This year we lost key staff, rotated others and faced the difficult realities of competing in a full employment economy for technically sophisticated user-centered personnel. The first half of the salary adjustments appeared in 1998-1999. Staff presented at conferences, served externally as trainers and consultants, and participated in the fullest year of development opportunities offered yet. Once again the senior survey showed the high regard enjoyed by the library. Reynolds played an important role in the Year of Globalization and Diversity, acting as a showplace for exhibits and as a site for receptions. Our staff and collections were mentioned favorably in the acknowledgment sections of many recent scholarly works.

The implementation of the new automated system was not as smooth as we would have liked, but one positive aspect of the process was the collaboration with Information Systems and the other Wake Forest libraries. Another major initiative for the library was preparation for the Divinity School's opening. No additions to the library's material budget were provided for this purpose, but grant money and transfers from other funds, as well as the processing of thousands of gift materials allowed us to move forward.

The major outstanding issues for us concern our facilities; we have a critical space problem, and we have serious air quality, temperature and humidity problems affecting staff and our collections, including our most precious materials.

We approach the millennium with a sense of purpose and a determination to continue to pursue excellence in our services and resources, with the support of the university administration.

EXECUTIVE SUMMARY

- Resources - We have worked closely with faculty to identify and test electronic resources that truly expand what we are able to provide. We have also done everything possible to get ready for the new Divinity School by acquiring materials and processing gift collections.
- Digitization projects - We have digitized some of our unique resources, including a manuscript Civil War Diary, illustrated by the author, and some the indexes to the Biblical Recorder.
- Multimedia projects - We have developed the expertise and the facilities to help students and faculty with multimedia creation and editing and are so doing.
- New library system implementation - The Dynix system was turned off on June 30, 1999 and all the dumb terminals that provided stacks access to our old text based system have been replaced, courtesy of Jay Dominick, with used PCs . They came from our ITC lab, which was recently upgraded, as the only general lab left on campus. The implementation was very rocky and took far too long, but it will be justified in time.
- Development plan - A plan to increase external support for the library was written and distributed to University Advancement. As new needs emerge, the library administration wishes to seek this support as a major priority.
- Staff development - The ZSR Staff development program reached every staff member and contributed to continued growth and improvement. We provide a model for the university to follow.
- Remote storage -: After unfortunate misunderstandings about the possibility of a quick solution to the problem of insufficient shelf space for at least the next five years, the libraries combined to draw up requirements for remote storage of less used library materials. Several solutions are being considered, but much time has been lost.
- New elevator - Many people are very grateful that there is now another alternative to the Reynolds elevator besides the stairs!
- Salary and classification adjustments - The first half of the salary adjustments was added to staff qualifying for them, and job classes, descriptions and titles were updated to reflect the many changes in the workload of library staff.
- HVAC - Despite tinkering and piecemeal efforts to improve the operations of the systems which control our work environment, serious problems continue to plague the library. Temperature, air quality and circulation as well as humidity control in the Reynolds Building do not seem amenable to all the efforts put in by Facilities Management to make lasting improvements.

ACCESS SERVICES TEAM
Executive Summary 1998 - 1999

Circulation

The following new programs and services were undertaken this past year:

- Administration connection made and procedures instituted to place holds on registration and transcripts for delinquent student patrons
- Web page posted online for circulation, including revised circulation policies
- Patron database purged of patrons with no checkouts for the past three years
- Inventory test project in the B classification completed
- Out-of-print replacements ordered for requested missing books

The following programs need to be undertaken:

- Complete implementation of Voyager in circulation
- Establish off-site storage arrangements
- Upgrade security and safety of library and collection
- Inventory collection
- Upgrade study carrel

Reserves

The following new programs and services were added this year:

- Online e-mail service provided for faculty members served by reserve
- Records for all reserve items duplicated in anticipation of Voyager

The following programs need to be undertaken:

- Complete implementation of Voyager reserve module
- Coordinate reserve module with instructors' electronic reserves

Current Periodicals

The following new programs and services were added this year:

- Ethnic Studies and Bibliography/Women's Studies subject areas added to periodical shelves
- Statistics show that usage of paper collection increased

The following program needs to be undertaken:

- Record usage statistics for periodicals by title

Preservation

The following new programs and services were added this year:

- All archival boxes made in-house with use of new board shear

- Exhibits reach out to the university community

COLLECTION DEVELOPMENT Executive Summary 1998 -1999

Collection Development, now in its third year as an administrative unit, continues to function as a clearing house and way station in the library's range of materials management and purchasing. Collection Development operates collaboratively with the bibliographers, with orders and bookkeeping in Technical Services, with collection management elements of Access Services, with university academic departments for both budgeting and collection development issues, and with the Technology Team for interaction on system requirements for collection development activities. This year brought serious challenges to the work of this unit because of the change from the Dynix online library system to Voyager. This switch impacts not only current ongoing work, but will require significant study and alteration of many collection development functions.

INFORMATION SERVICES Executive Summary 1998 -1999

Information Services Team, TeamInfo, was originally comprised of sixteen members from the Information Technology Center (ITC), Government Information & Microtext and the Reference Department, including Interlibrary Loan (ILL) and Document Delivery. In March 1999 with the formation of the Technology Team, the three staff members from ITC and the electronic resources specialist in Reference were reassigned, reducing the TeamInfo to twelve members.

The Team facilitates access to information. The Team endeavors to develop skills among students, faculty and staff leading to independence and lifelong learning within the university's stated purpose in the pursuit of liberal learning. Team members are variously involved in library instruction, ThinkPad orientation, face-to-face tutorials, development of Web-based instruction, subject specific collection development and routine maintenance of library collections and materials. 70% of TeamInfo members have the responsibility and credentials as well as the budgets to make informed selection of print and electronic materials. This assures that the University's research collections remain current and appropriately diverse.

Increasingly subject specialist bibliographers and library instructors seek ways to collaborate with faculty to enrich and add value their students' academic experience. This is evolving in important ways. The science specialist has been asked to teach a required chemical literature course in the Chemistry Department this fall. The business specialist now "captures" all of the Business 100 students (seven sections) and presents a common menu of information to all. The social science specialist has handled marathon instructional sessions in psychology for years. Surprisingly some students remain library

illiterate. Our goal is to get them all.

TeamInfo collaborates with other library teams, often Access Services Team, in providing educational and technical support for summer programs, particularly Summer Debate Workshop - a challenge to us all and one we believe we serve well.

Data regarding the installation of the Voyager Project will be reported in other team reports. TeamInfo will have the instructional lion's share in presenting Voyager to its new users and is looking forward to sharing out its new information-yielding features.

SPECIAL COLLECTIONS Executive Summary 1998-1999

The Special Collections Team realized a successful year in its programs and services. Several special collections were digitized for the World Wide Web to bring global access to the unique and valuable collections in the Z. Smith Reynolds Library. In the Rare Books & Manuscripts Department, the Civil War memoirs and sketches by Herbert E. Valentine were digitized. Valentine's personal account of the military activity of the 23rd Massachusetts Infantry along the coasts of North and South Carolina can be viewed via the Department's homepage. The North Carolina Baptist Historical Collection's indexing project forged ahead as Academic Computing Specialist Dan Pfeifer assisted the staff in digitizing mid-19th and late 20th indexes to issues of the Biblical Recorder, the Baptist State Convention's monthly publication.

The Rare Books Department staff and collections were featured in the Wake Forest Magazine (December 1998) and Window on Wake Forest (October 1998 and May 1999).

The Department's unique Hogarth Press collection and the Department's extensive work in the conservation of fragile documents were the highlights of feature articles written by Assistant University Editor Andrew Waters.

A new professional position, manuscripts librarian, was established within the Special Collections Team. Susan McDonald was promoted from information technology specialist to manuscripts librarian in October 1998. The new position will strengthen team building since manuscripts collections form a common link between the three areas of work within the Special Collections Team.

The Harold T. P. Hayes manuscripts collection within the Rare Books & Manuscripts Department was featured in the work of National Geographic production company Cunliffe and Franklyn. Hayes, an alumnus of Wake Forest (1948), studied and recorded works by and about Dian Fossey, mountain gorilla activist and conservationist in Rwanda. Cunliffe and Franklyn recorded Sharon's voice for inclusion as the voice-over for Dian Fossey in the upcoming production.

The advent of the first academic year for the Divinity School brought with it increased activity and interaction for religion bibliographer Sharon. As the School of Divinity has prepared for its opening in the fall of 1999, Sharon has worked closely with Dean Bill Leonard, Director of University Advancement Wade Stokes, and Collection Development Librarian Jill Carraway to insure adequate library resources are guaranteed for instructional purposes. Sharon and Jill have provided data to the Dean of the School for inclusion in SACS review reports and for comparisons with resources in other academic programs of divinity. Sharon has worked with Wade Stokes in developing ideas for fund raising opportunities for potential donors to the Divinity School.

TECHNICAL SERVICES TEAM Executive Summary 1998-1999

The Technical Services Team's year was dominated by preparing and planning for the migration from Dynix to Voyager. Team members worked with both the Systems Librarian and the Migration Team by providing detailed information necessary for a complete and accurate transfer of data. As soon as the test database was ready, each unit within the Technical Services Team began exploring the system. We held a "Show and Tell" session for other Teams as well as other library staff members.

With the exception of the Acquisitions module of Endeavor, Team members are well versed in the daily use of the new system. Some aspects of technical processing within the new system that are awaiting implementation are:

- Serials check in records
- Monographic ordering and receiving (manual and electronic)
- Establishing structures for fund accounting
- Electronic invoicing of Serials
- Report writing

The one other major concern closely associated with Endeavor and its usage is the lack of adequate access to the system for our student assistants.

During the migration, many technical functions were put on a "freeze". The Team worked diligently to complete the transfer of much of this data into Endeavor (some handwritten, others collected as hard copy printouts). We continue to look at our processes in hopes of streamlining them. As we examine workflow and prepare for the next fiscal year, we see the following as plans for FY2000:

- Update and write procedures manuals for all units
- Contract with PromptCat for cataloging of approvals
- Examine financial reporting functions in Voyager
- Implement electronic invoicing of serials
- Reexamine standing orders and continuations workflow
- Transfer publication retention and processing information from card files to Endeavor

- Examine (when it becomes available) electronic ordering with Endeavor
- Fully implement the Voyager Acquisitions module
- Discontinue usage of the OCLC dedicated lines

TECHNOLOGY TEAM Executive Summary 1998 - 1999

The Technology Team was formed in the 1998-99 academic year to draw together the resources required to work on several mission critical projects in the Z. Smith Reynolds Library. These projects included the Year 2000 (Y2K) Compliance Project, the Voyager integrated library system implementation, and ThinkPad Orientation. The Technology Team brought together the members of the Information Technology Center (ITC) and Library Systems into a single unit and created linkages to valuable people on other teams who act as a bridge between the teams. This bridge between the Technology Team and the other teams reflects that the library administration understands the persuasiveness of technology in all library processes and the need to build a strong communication infrastructure to coordinate technology initiatives.

An ad hoc committee of library staff from the ITC, Library Systems, the Reference Department, and Library Administration met throughout the Fall semester to identify the critical initiatives and tasks confronting the library. Before the official formation of the team, these tasks were assigned to the departments and individual staff who either traditionally worked on them or had the experience and capability to work on them. Communication was loosely tied together through the ad hoc committee at this time.

In January 1999, Dirk Faude, Information Technology Center Manager, was appointed Interim Team Leader for the newly created Technology Team. The ITC and Library Systems now report to the Technology Team Leader. Dirk Faude worked closely with the Director of the Z. Smith Reynolds Library, Rhoda Channing, to identify the goals and objectives for the team. The main goals have been stated: the successful completion of the Y2K Compliance Project, the Voyager integrated library system implementation, and ThinkPad Orientation. In addition, the Technology Team is responsible for computer hardware and software upgrades in the library.

ThinkPad Orientation was an unmitigated success. Feedback from all parties involved affirmed that the goals and objectives of ThinkPad Orientation were achieved. The other critical initiatives, Voyager implementation and Y2K Compliance, are ongoing initiatives that have achieved the expected milestones and are on schedule to be completed in the coming academic year. Similarly, the computer hardware and software upgrade process is a continuous process. The Technology Team has fine tuned the process to ensure that asset management information is 100% accurate and that the upgraded process is in alignment with the library's strategic plan.

CONCLUSIONS AND A LOOK AT NEXT YEAR

The four major areas of concentration for next year are:

- Remote Storage - A solution MUST be found for our short term storage needs while we debate the merits of alternatives for long term storage. We believe that Twin Cities is the best answer to our problem.
- Development - More efforts must be directed toward getting administrative buy-in to a comprehensive development plan for the library to provide a secure base for the millennium. We are looking at establishing a Friends of the Library program.
- Exploitation of the new Voyager System and developments with WIN and PeopleSoft - If we are to continue to be a state-of-the-art library we will need to develop powerful applications to provide seamless access to information and harness the power of the new administrative software to enhance our efficiency. This will be a year of learning about the features and possibilities of our new software.
- Stabilization - We have had many important personnel changes, and will be rotating our Team Leaders in July of 1999. Getting all new staff up to speed and working effectively in teams will take time and effort. Also, with the resignations of both Tom Steele and Mike Sprinkle, we face some changes in the ways the three libraries relate to one another, and will have to develop new relationships.

ACKNOWLEDGMENTS

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