Doe/Moffitt Annual Reports: Guidelines

The Doe/Moffitt Advisory Group has affirmed our interest in creating and sharing annual reports within Doe/Moffitt as one method of reflecting on our accomplishments, identifying problems that cross departments, and developing our library’s priorities. Each Doe/Moffitt department head will create a succinct annual report following the academic calendar year, covering July 1 – June 30. Reports will be due by September 15 after annual statistics are submitted. The following are general guidelines. Each year we can revisit the process, framework and principles to make improvements.

Logistics:
- Cover period of July 1 through June 30
- Limited to two to three single-sided pages
- Include the six sections outlined in the framework below
- Submitted annually via email by September 15 to the Director, Doe/Moffitt Libraries
- Posted to the Doe/Moffitt staff web site, announced by email to dmstaff@lists

Framework:
- Department name, department head, and period covered
- Department Overview
  - Provide a 2-4 sentence summary
- Year’s Highlights
  - Cover big issues, new services, and major accomplishments
  - Omit general statements such as “staff contributed to many task forces”
  - Areas to consider: public services, collections, technical services, and educational initiatives; department heads should decide what categories and organization makes most sense for their unit; inclusion of statistics as appropriate
- Obstacles
  - Cover major obstacles and recommendations if appropriate
  - Include elements within the larger Doe/Moffitt and Library environment
  - Areas to consider: personnel and staffing, budgets and funding, systems and support, service quality and responsiveness, physical facilities, online/web sites
- Department Goals
  - Provide priorities and goals specific to the department or units within the department for the following year(s) as appropriate; might include goals shared with or contributed to by other departments or units as well
- Department Members
  - Include names and titles of staff in department when report is submitted

Principles:
- Document aspects that will be beneficial for the department and DM overall
- Not intended to acknowledge each individual but the work of the department in general
- Frame information as a department, not separate reports for each unit in department
- Use bullets to pack as much meaningful information as possible
- Provide brief descriptions when helpful; refer to other documents/URLs for details
- Collect information throughout year so not onerous in July
- Share draft with department in advance of submitting final version
- Highlight elements from annual reports with Doe/Moffitt staff

E. Dupuis | October 2008