University of Massachusetts Boston
University Libraries
Annual Report
2015

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University Libraries Annual Report

Executive Summary

In 2015 the university libraries served 68,983 online visitors with access to over **1 million downloads of research articles and books**. On campus, the library served **480,866 onsite visitors** with over **68,257 service transactions at the 2nd floor of the library**. Many other services were provided in the library at the Reference Desk, by email, and via QuestionPoint, the 24/7/365 online help utility. Additionally, over **12,000 books and journals were borrowed** via interlibrary loan from around the country and the world. Library holdings reached **1.5M items**, one of the most significant achievements of this year.

The library offered over **400 instructional sessions** on library research **with over 9,000 students** in attendance. This year, a new innovative program was launched to combine the instructional work of two units, integrating primary and secondary sources in support of undergraduate research on campus. There is only one other program in the country that is attempting similar synergies.

University Archives and Special Collections held various events in support of the 50th anniversary celebration of the founding of the University, culminating in unprecedented growth of the collection on the history of the campus, virtually doubling its research collection of primary sources in one year. UASC's footprint was improved by the addition of a climate control vault to replace the one flooded in 2014. The Massachusetts Memories Road Show, and arm of UASC, continued to partner with historical societies, towns, foundations, etc. to host the collecting of materials documenting the development of Massachusetts for future research.

Strategic Planning and Visioning for SOALITS

The libraries engaged in the first steps to develop a strategic plan to meet the campus Goal 3, Objective 8, to develop state-of-the-art library and IT services (SOALITS), which includes a partnership with the Information Technology Services Division. This is expected to gain impetus in 2016 after the appointment of the new CIO, and the forthcoming inauguration of an academic program with CAPS in the Healey Building.

Vision

This year, library leadership worked with librarians and professional staff to develop the first draft of the vision, mission, and strategic plan for library services at the University of Massachusetts Boston:

University Libraries Seek to be the Heart of the 21st Century University
Library Services at the Boston campus aspire to retain the preeminence of libraries as the heart of the university in a 21st century context where information is decentralized and access to knowledge is ubiquitous encompassing many places, languages, and formats. Through partnerships with information technology, service providers, and other vehicles, the university

will store, share, and create information of relevance to forward the development of the campus vision, goals and collocation.

Library Services and Intellectual Property (IP) are Innovative, Accessible, Valuable and Available 24/7/365
Library Services at the University of Massachusetts Boston are central to academic work on and off campus via state-of-the-art delivery 24/7/365 anywhere and anytime. Library Services and IP are innovative, inspiring, motivating, stimulating, and core to the development of faculty, students, and staff in a variety of forms and ways, particularly in learning, instruction, and research. Library Services add value to the campus academic community, regionally, and beyond: nationwide, internationally, and transnationally.

University Libraries are a Model of New Leadership and Entrepreneurialism
Library Services at UMass Boston are an example of new library and archives leadership offering core cutting-edge integration of traditional, new, and developing services to the campus community and beyond. Library Services are entrepreneurial in a variety of ways, including marketing, leading the transformation in the user experience, in the development of financial models to support library service transformation, in the solicitation of grants and opportunities to market the work it does, and in developing and implementing assessment of its professional practice and of library research instruction and other areas of library service.

Mission

The University Libraries (UL) mission is to deliver resources and services in person and virtually to the academic colleges, departments, staff, students, and faculty that constitute the UMass Boston community. UL seeks to support the campus goals with state-of-the-art infrastructures and by implementing best practices for information management that augment the knowledge and accessibility of the community of Intellectual Property (IP). To this end, UL provides a growing array of rich resources for teaching and research from traditional publishers, as well as from digital commercial providers, and from the open access scholarship publishing world. UL pursues offering library collections and services which mirror the development of the campus as a research extensive Carnegie 1 ranking institution.

Goals

The UMass Boston Strategic Plan identifies the following goal and objective:

Goal 3: *Improve the learning, teaching, and working environment*

Objective 8: *Ensure state-of-the-art library and information technology facilities and services that support the university's teaching and research goals.*

The UMass Boston Master Academic Plan states the following about the role of academic libraries at a research university:

"This [learning, teaching, and working] environment is constituted by libraries, also. This means space, and even buildings, but, even more so, indexes, databases, journals, books, websites, a rich complex of archival materials, and conditions under which those materials can be properly stored, organized. It requires space for deep reflection, quiet study, group interaction, and learned librarians who are committed teachers and mentors who feel integral to part of the community of scholars-teachers (faculty and students), as well as to the broader social and human communities which libraries serve and by which they are supported. Libraries are also members of wide networks, often finding complements in partnerships with one another, locally, nationally, and globally."

Preliminary Goals for 2016

In support of these goals and values, the University Libraries identify the following strategic objectives to be accomplished within the next 3 years:

1. Select, acquire, and implement a web-scale discovery tool that integrates print and electronic resources (both subscription resources and openly available resources), archive holdings, course reserves, and some library website content

2. Develop a library staffing and development plan to provide critical support and expertise for library systems and services in support of campus research and teaching

3. Develop and implement a full range of services for any library patron regardless of physical location, ability, or device

4. Develop, implement, and assess programmatic research instruction at the graduate and undergraduate levels, both online and on campus

5. In collaboration with IT, develop the necessary infrastructure to provide SOALITS and support to build the Learning Commons

6. Develop a strategy to engage stakeholders in decision-making processes for resource provision

7. Identify and develop resources and expertise to become a campus reference center for scholarly communications and open education efforts on campus

8. Implement evidence-based decision-making practices, based on both external data sources and ongoing library assessment efforts, to continuously improve services throughout all functions of the library

9. Identify and pursue external funding sources to develop state-of-the-art library facilities and services (SOALITS)

10. Demonstrably improve the learning experience of students through experiential, community-based, and other inquiry-guided approaches

Goals for 2015
The preceding goals stemmed from the existing goals and last years' challenges:

- Continue identifying and procuring licensed intellectual property and other resources needed for research, teaching, and learning, in particular for newer academic programs
- Continue promoting campus conversations on important issues affecting scholarly production (scholarly communication, copyright retention, and fair use)
- Participate in the NEASC visit and facilitate the University Libraries (UL) visit and interpretation of the visiting team of UL success and challenges.
- Assess student and faculty perceptions of the UL and conduct assessments measuring student learning and functional outcomes
- Develop a suite of services and policies designed to facilitate the best use of Intellectual Property (IP) for students enrolled and faculty teaching on and off campus, including graduate, online, and global students
- Develop and deploy methods that enhance communication and marketing of UL resources, services, and activities throughout the campus communities
- In collaboration with IT and CAPS develop a state of the art library and IT services (SOALITS) plan that maximizes effective and efficient delivery of resources in a 21st century context
- Continue improving facilities and maximizing space deployment to create attractive environments for study and collaboration
- Continue fostering existing and developing new relationships that create local, national, and transnational partnerships that enhance access to specialized and rare collections
- Promote increased support to UL to develop SOALITS, UASC, and other infrastructure and support services needed to fulfill the strategic goals of the campus and its vision as a research extensive institution

Accomplishments and Activities in Support of 2015 Goals
In 2015, UL reached an important benchmark with close to 1.5M in holdings, mostly in electronic resources. Library materials available via the umb.edu/library are accessible to all 24/7/365, regardless of location, and are selected only if these are Section 504 compliant. The 1.5M holdings benchmark is an important metric as it supports the campus global vision, and it supports faculty and student productivity in ways that traditional library services could not accomplish in the past. It is important to note that recent studies show a correlation between electronic library holding and faculty research productivity output. One study succinctly looks at this productivity correlation, included in a link below.

http://scholarscompass.vcu.edu/cgi/viewcontent.cgi?article=1032&context=libraries_pubs

UL also supports the effective use of this licensed intellectual property (IP) through an evolving information literacy or library instruction (LI) program. UL also supports the campus

innovatively with on-demand purchase programs, document delivery, and international interlibrary loan services under the Resource Sharing and Document Delivery (RSDD) unit in the library.

The LI program offered more classes this year (400), and reached out to more students (9000) than in previous years, thanks to new librarians and leadership in the Reference Outreach and Instruction (ROI) department. This year, ROI collaborated with the Information Technology Services Division (ITSD) to integrate iPads in teaching and library research, one of the most innovative programs in the library-ITSD partnership program this past year.

UL has seen some interesting metrics that show the use of library electronic services through the university website is extensive and beyond the confines of its walls and the limits of traditional onsite library services and holdings. For example, in AY2014/2015 the library website had 68,983 visitors, 30,847,623 page views, and over one million downloads of research articles and books in 2015.

Single-page Summary 01/Jun/2014 – 31/May/2015, 365 days

Overview

		Avg/day
Hits	30,847,623	84,514
Page views	18,264,225	50,038
Visitors	68,983	188
Size	738.74 G	2.02 G
Sessions	431,991	1,183

Use of library electronic collections in 2015 was 24/7/365, as illustrated on the table below.

↑Day of week	Hits	Page views	Visitors	Size	Sessions	Session duration
1 Sunday	4,265,567	2,321,556	17,453	111.02 G	53,649	1y 148d 00:52:03
2 Monday	4,433,891	2,362,901	20,947	116.89 G	65,984	1y 236d 20:13:24
3 Tuesday	4,293,351	2,306,243	20,849	113.42 G	65,797	1y 230d 13:26:01
4 Wednesday	4,590,140	2,677,943	21,715	107.71 G	67,870	2y 23d 19:19:24
5 Thursday	5,081,666	3,299,427	22,254	109.07 G	72,682	3y 300d 15:59:57
6 Friday	4,835,470	3,340,040	20,134	94.90 G	68,102	4y 134d 03:13:30
7 Saturday	3,347,538	1,956,115	15,633	85.72 G	42,893	1y 2d 19:19:39
Total	30,847,623	18,264,225	–	738.74 G	–	15y 346d 20:23:58

Department Reports

Onsite, the library served 480,815 students and faculty, a reduction of 18,493 onsite users from last year's metrics, with 68,257 transactions at Circulation Desk on the 2nd floor alone.

	FY 11	FY12	FY13	FY14	FY15
Total Patron Count	418,666	450,385	437,866 (-10% from last year)	498,708 Highest total since count began	480,215
Comments	Increased complaints of insufficient quiet study space.	Library patronage continues to increase. Increase in requests for quiet study space are a major concern for students.	Tutoring Center temporarily housed on 8th floor. New furniture purchased, and old furniture refurbished to meet seating needs.	Vast increase in library use due to better library experience, and new furniture layout. Complaint: insufficient quiet study area. Tutoring still on 8th floor using up seating for group study, one of the most popular requests from students.	Library study space noise complaints, from Tutoring, and multiple projects throughout the library, and seating space competition.

## *ROI: Reference Outreach and Instruction Services*
In 2015 ROI continued to support student and faculty by providing research assistance face-to-face, online, by email, and by offering faculty customized LI sessions to both undergraduate and graduate courses.

- 6,374 total questions answered
- 1,463 questions answered by reference librarians
- 426 chat reference sessions conducted through our reference cooperative
- 849 chat sessions initiated by UMass Boston patrons
- 468 library instruction sessions, reaching 9,291 students (27% increase over previous AY)
- 5 of the aforementioned instructional sessions were conducted University Archives and Special Collections (UASC) in collaboration with ROI, reaching 68 students.

Library Instruction Courses by Student Audience
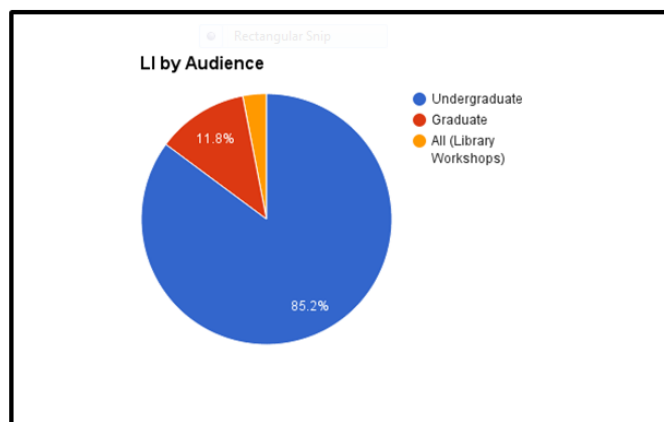
Undergraduate LI Headcount by College
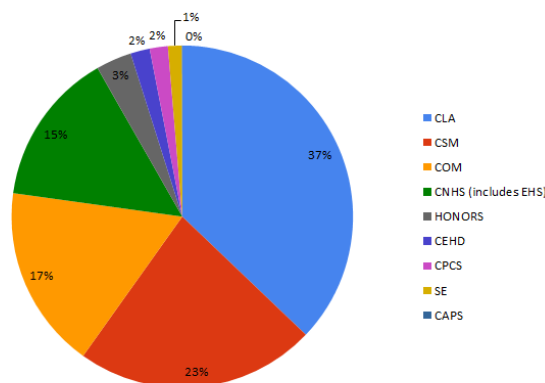
UASC: University Archives & Special Collections

UASC held various events in support of the campus 50th anniversary celebration culminating in unprecedented growth of the collection on the history of the campus. UASC also pursued multiple research collection of primary sources that were donated to the campus for future research. To this end, UASC is working to meet the need for an archive that is a worthwhile research destination for donors, scholars, students, and researchers. UASC dedication is bearing fruit as it is becoming of interest to local, regional, and global donors and scholars that wish to

gift Archives with their primary sources to augment the research collections on campus. UASC is increasing and enhancing the visibility of the library and campus.

In 2015, UASC continued to run, as it has over the last ten years, the statewide and notable Massachusetts Memories Road Show with four different events culminating with the addition of many primary sources in Massachusetts families' collection which document the history of the state and its communities. Many of the additions to MMRS this year, document the changing profile of New England communities and towns as their traditional roots are shaped by new people, in particular communities of color as the diversity of the state and region blossoms. Link provided:

http://openarchives.umb.edu/cdm/landingpage/collection/p15774coll6

The improvements in the layout of the 5th floor and the redeployment of other stack or storage areas this year provided UASC with the much-needed storage to accept new collections. Two immediate challenges arose from the increase in receivership of new archival research collections.

RSDD: Resource Sharing and Document Delivery
RSDD is one of the vital linkages and program implementation units in the library responsible for borrowing resources and library materials not available in the current array of IP in UL. RSDD also works to identify library materials that UL should own that it does not own. This service, Purchase on Demand, allows for quick return time supplying faculty and students with IP needed that cannot be supplied by another library or that should have been purchased or licensed.

This year's changes in RSDD staffing, along with changes in metrics in other units in the library, alongside with a redefinition of document delivery initiated a new customer service and staff training initiative: Common Ground. The pilot for Common Ground also looked at customer services gap analysis emerging from two surveys, MISO and LibQual, along with anecdotal data received from a variety of sources and ways. The conclusion of this gap analysis was that staff, at all levels and points of service in UL, needed to be trained and prepared to better serve library customers with an awareness of UL's portfolio of services.

From the implementation of the Common Ground pilot, it was clear that more work was needed to establish better outreach and feedback mechanisms from UL to the Colleges and vice versa. This effort could be done in coordination with ITSD, as they also have similar needs and challenges in communicating the variety of services available to our patron base.

Noteworthy
In 2015 new librarians and staff were hired to strengthen the library's professional body of informational consultants and experts. The work to further develop these new staff members and librarians is challenging and exciting. The investment in these new hires will begin to impact the development of state-of-the-art library and IT services (SOALITS) shortly (Campus Strategic Plan Goal 3, Objective 8).

Another accomplishment is the strong developing partnership with the Information Technology Services Division. This past year, the ties between IT and the Library have grown stronger, and are expected to improve with the appointment of a new Vice Provost and Chief Information Officer who is interested in the University Libraries as a partner and a priority of his work agenda on campus.

Another significant accomplishment this year was closing the stages of the NEASC self-study and report, culminating in a successful and positive review of the state-of-the-art library services on campus. Healey Library received full recognition from faculty and students during the accreditation visit, which in turn provided the accreditors with a solid set of positive comments regarding library services at UMass Boston.

This past year more licensed resources were added to the collection increasing ease of use and availability of research materials, along with an increase in the quality of the collections available 24/7/365. There is a strong correlation with the increased use of library resources and their ease of use and around-the-clock availability. The next step is delivery to mobile devices in formats that expand their universal accessibility and functionality.

This year the library embarked on two major student learning assessment with Sociology, and the English Departments. Both studies are yielding extremely important data that could provide significant information to help the library refine and expand its delivery of information and offerings, including online and mobile delivery.

The last highlight of these selected accomplishments is the work with international partners. Healey Library engaged in supporting the digitization of a rare book collection in the Special Collections department of the University of Seville. This work attracted the Archives of the Indies (Archivo de Indias) who has the most extensive collection of primary sources on the history of colonization in North and South America, as well as the Caribbean. Exploring this collaboration is necessary to further understand the benefits and challenges as well as whether or not the investment is cost effective.

Challenges for 2016

Space continues to be a major concern. At this point, despite the need to develop a master plan for library facilities, there is no room within the next two years to start that conversation, as per the campus planning office.
As the REAB project progresses, it is clear that space in McCormack and Wheatley will not meet all practical needs. Space in the library may be required to relocate some functions from those buildings into the Healey Library, hopefully temporarily. The library building has the potential for becoming swing space. This is a significant concern.

At this time there exists major pressure from students who report a need for more, and better quality study space in the library. The NEASC visit, and two other surveys point to the needs for more and better quality seating, IT-enabled work areas, 24-7 library access, etc. The student body is requesting new seating, new services, and more accessibility with quiet and group study spaces that meet the growth in enrollment now and in the future (NEASC 2015).

The space need problem is compounded by the growth in UASC collections requiring special controls for preservation and conservation. Most of the current UASC archival storage space does not have humidity or temperature controls needed to secure the longevity of these primary sources. As UASC continues to expand, more space will be needed in the building.

Another conflicting need is the desire to add a new unit in the building focusing on library and information management that will work as extension of the envisioned program as a real laboratory for students, faculty, and others pursuing degrees and certificates to be offered in the near future. The number of major facilities projects on campus, REAB, GAB1, GAB2, Residential Halls, and University Corridor Roadway Relocation are extensive and requiring the attention of many people and depleting library spatial resources, somewhat relegating the need for improvements in the library to accommodate new functions, function better, and expand to meet the demands stemming from planned growth.

An important area to consider is staff growth and development which will remain a challenge for library and campus administration. New learned librarians will be needed as the university reaches its enrollment goals to mirror the current services provided by our peer institutions with middle and large sized research libraries.

One of the possible solutions to the space problem is to explore newer state-of-the-art library models and hire consultants to help us redeploy the current square footage of the library with new usage, new furniture, etc. that can increase seating capacity within the existing space. This could be the first step to take a closer look at what is needed from IT to secure state-of-the-art facilities by adding to the building or considering a new building to house a multitude of functions as they are in new research libraries at other institutions.

Additional funding will be needed to increase the size of the library staff and their professional depth of knowledge. This could be carried out in conjunction with a larger staff review in IT and other departments that serve students and faculty. This is a major challenge in 2016 and in years to come as state and external funding availability is highly competitive.

2015 and Beyond: Strategic Strengths and Challenges for the University Libraries

The campus strategic plan poses foreseeable challenges that enable the library to consider a strategic response to increasing enrollment, expanding academic programs, the emergence of residential student life, and moving towards a research extensive classification. There are several areas of concern:

Space shortages there are recommended minimum square footage requirements per user/computer. According to the NEASC report students require additional and better quality library study space for individuals and groups

Infrastructure issues computer access and support continue to be major issues in the development of state of the art library and IT services for the campus.

Communication and dissemination of services effectively communicating the portfolio of library services is an ongoing challenge as a wealth of resources appear to be

hidden from faculty and staff. IT shares this problem – that the tools with which we communicate new developments are not effectively reaching the target audience

Updating and integrating modern technology the University Libraries' capacity to develop and maintain updated and efficient online services, including 24/7 technical support, information literacy instruction and access to research materials on all devices worldwide.

Software, systems and tools services such as the library catalog or the Integrated Library System, (Voyager), do not meet the 21st century expectations of our faculty and students. 21st century research libraries offer full digital services that are state-of-the-art and enhancing access to needed Intellectual Property (IP). New systems and tools are needed to meet the SOALITS goal.

Professional Staff Librarians it is a challenge to attract and retain high performing librarians during this transitional time at the University. The UL seeks to employ librarians who deliver high quality instruction, provide research and technical support, contribute to successful acquisition and accessibility of resources, and demonstrate leadership in the face of the changing University landscape and funding concerns; however, having adequate staffing levels in a complex and quickly changing environment is critical to offering state of the art library and information services.

Funding as expected, funding is an ongoing factor that must be vigilantly maintained at acceptable levels in order to meet short term and long term University and University Library goals.

Conclusion

It is clear that the current UL staff is dedicated, productive, and willing to make a difference moving library service improvements forward to meet industry wide best practices. Their motivation is exemplary, and their work ethics continue to help move the long term University strategic plan forward. Service expectations inherently rely on the skills, aptitude and experience of the personnel who are charged with representing the University Libraries.

This undeniable strength, however, is a single pillar that will contribute to the UL's ability to uphold the University's mission. In order to make the radical changes needed to meet today's digital service delivery standards and library service goals, our challenges must be met.

The development and build-out of SOALITS will require larger numbers of skilled staff, working closely with ITSD staff, to select, implement, and rollout a new Discovery Tool and ILS that will be functional and accessible for mobile delivery.

UL is repositioning itself to rely on its strengths to meet the campus vision and growth, and it will continue to do so in 2016 and over the next few years with the support of the Provost, Deans, Executive Leadership, ITSD, Facilities, and Campus Planning.