

Joseph P. Healey Library
Annual Report – AY2017-18

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The Joseph P. Healey Library at the University of Massachusetts Boston plays a leading role in the University's dynamic culture of teaching and learning while also supporting the campus' commitment to urban and community engagement. Despite significant financial and resource setbacks in AY17-18, the Library made notable gains and achieved remarkable success in achieving its strategic goals. In the course of the 2018-19 academic year, Healey Library will leverage its many strengths and manage inevitable obstacles in order to further strengthen its resources and services, which serve as critical contributions to the academic health and success of UMass Boston.

REVIEWING HEALEY LIBRARY'S AY 2017-2018 GOALS

Healey Library Goal #1 (AY17-18): *Implement state-of-the-art library systems, including "Alma", a unified library resource management system, and "Primo", a cutting-edge discovery and delivery tool.*

Healey Library successfully fulfilled this goal in AY17-18, aligned to campus goals in the following ways:

In support of *Campus Goals 1, 2 and 3*: The new library system (branded as "UMBrella: covering all your research needs!" after a public naming contest won by a student) was successfully launched on the targeted "Go Live" date of January 31, 2018, providing a transformational and unprecedented major system upgrade for UMass Boston. UMBrella offers an integrated platform that invites powerful and personalized search and discovery experiences with sophisticated relevancy ranking algorithms running behind the scenes, increasing the discoverability and visibility of the intellectual properties that are owned and subscribed to by the university. UMass Boston is one of 1,200+ institutions that have adopted Alma and Primo, including a number of institutions in the Boston area such as Boston College, Boston University, Brandeis University, Harvard University, Northeastern University and Tufts University. Faculty have described UMBrella as "game-changing," "transformative," a "smashing success," "absolutely phenomenal. An incredible tool for research at UMB!" Students have told us: "I love the update - much better system than before from a user perspective," "makes my work so much easier!", and staff and administrators have expressed their enthusiasm, calling UMBrella "really useful!", and "exciting stuff" for UMass Boston, and writing "I had no idea I had access to all these resources!".

In support of *Campus Goal 5: Develop an infrastructure supportive of the preceding goals:*

Healey Library's Alma and Primo implementation is the first major upgrade to the library's core system infrastructure in almost 20 years. This new system enables significantly improved services and efficient workflows to meet the needs of research, scholarship, teaching, learning and student success and as such was enthusiastically received by members of the campus community.

The implementation of Alma and Primo was successful despite the intensely demanding project timeline and the unprecedented scale and complexity of the project, coupled with the additional challenge of reduced financial resources. Implementing the new system involved multiple stakeholders, including Library and University administration, the entire staff of Healey Library, UMass Boston ITS, UMass system-wide ITS, the vendor Ex Libris, UMass Boston's Division of Enrollment Management, Human Resources information systems, Office of Student Affairs, and Office of Communications. The

implementation of these platforms demanded high levels of commitment, expertise and engagement from all library staff, who devoted tremendous effort and demonstrated marked flexibility to adapt to the new challenges and increased cross-functional collaborations enabled by the new systems. During the implementation process, we established strong partnerships with campus and system stakeholders. The development of these collaborative relationships was essential for the Alma and Primo implementation process and will be equally important for the ongoing development of library systems and services going forward.

Healey Library Goal #2 (AY17-18): *“Expand library research instructional programs to include: a fully online instructional menu that supports the campus growth in online programs and outreach; a sophisticated focus on metaliteracy skills and tools that will help students persist and succeed; and formalized partnerships between community colleges and UMass sister campuses to equip transfer students with the skills and resources they need to succeed at UMass Boston.”*

Faced with a steadily increasing demand for instructional services, the Library has worked to create instructional offerings that are scalable, sustainable, and can be used independently by faculty or in collaboration with a librarian as appropriate to pedagogical and administrative needs. Healey Library made significant inroads in fulfilling this goal in AY17-18, aligned to campus goals in the following ways:

Campus Goal 1: Advance student success and development.

This year Healey Library began embedding research guides directly into the campus learning environment, available as a collection of learning modules faculty may select through a Blackboard drop-down menu when building their course pages. In response to this pilot initiative, launched in Fall 2017 with 21 participating faculty, librarians developed documentation and instructional materials to help faculty utilize these resources more independently in future semesters, allowing them to easily populate their course shells with library resources and instructional materials, which in turn positively impacts students’ course participation. The embedded research guides received a combined total of 19,647 page views during the pilot period, which is higher than usual viewing activity for library research guides, documenting that the embedded approach does, in fact, result in increased access of library research guides by students. ENGL 102 faculty provided the following feedback after using the embedded research guides in their courses: *“It is so important that students know that they must use credible, academic, peer-reviewed sources. Using the embedded research guides makes it impossible for students, especially our online ones, to say they don't know how to do that. It has made a real difference in the quality of papers we receive. Since the implementation of the guides, the incidence of unacceptable secondary sources in papers has all but disappeared in our classes.”*

The Library strives to balance in-person instruction for basic information literacy skills with online modules plus in-person active learning sessions to support graduate and undergraduate research assignments. In AY17-18, the Library fully accommodated faculty members’ requests for in-person delivery of research instruction to their classes to the extent possible (380 in-person sessions offered by 4 librarians) and also focused on developing online instructional resources to serve a 24/7 campus and to provide flexibility in pedagogical options for faculty. In-person library instruction sessions taught by Healey librarians have decreased significantly over the past three academic years, tracking a commensurate decrease in staffing as librarians who previously contributed to instructional services have, by necessity, been pulled away to perform other essential library functions. Continued efforts in developing online and hybrid instructional models will be critical for meeting the evolving needs of the growing campus community.

Campus Goal 2: Enrich and expand academic programs and research.

The Library supported efforts to build a culture of academic integrity and honesty on campus, working with Academic Support Services and Undergraduate Studies to create an instructional module with assessments that can be administered to students who have committed academic integrity violations for the first time, either intentionally or unintentionally. The guide and quiz, to be deployed in Fall 2018, document that a student has been made aware of the issues surrounding academic integrity violations and test their understanding of the concept of academic integrity in action. This documentation will assist campus administrators and faculty in addressing repeat violations.

Healey Library continues to partner with two- and four-year institutions of higher education to create a smoother transition to university-level research for transfer students, including an ongoing initiative, the “Bridge Project”, with five community colleges and public universities in Massachusetts to coordinate information literacy and research instruction sessions across the participating institutions. These partnerships in support of academic integrity and transfer student success are steps in creating formal avenues for introducing new and transferring students to foundational research skills and resources, and serve as a model for integrating library research instruction into critical touchpoints in UMass Boston students’ academic experience.

Campus Goal 3: Improve the learning, teaching, and working environment.

Healey Library’s instructional programs were enhanced by the integration of educational technology, as demonstrated by ongoing efforts to embed library resources into Blackboard as well as by the Library’s integration of a classroom set of iPads into its teaching program, guided by the SAMR [Substitution, Augmentation, Modification, Redefinition] model of technology integration. As a result of the increasing use of mobile devices for academic research, librarians are well placed to identify, evaluate and guide UMass Boston patrons and the wider community in finding and using the best mobile tools available for academic purposes. Thus, the library’s efforts around teaching with mobile technology resulted in a campus-wide workshop series, offered every semester, introducing academic apps for research and writing.

Healey Library’s multifaceted instructional efforts support and advance the campus strategic goals of advancing student success and development, enriching and expanding academic programs and research, and improving the learning, teaching, and working environment by providing students, faculty, and administrators with the tools they need to discover, locate and evaluate high-quality information resources, and to use those resources effectively and ethically, within both an academic and a broader social context. The library’s instructional programs and efforts have been advanced through powerful strategic partnerships both internally with campus constituencies, including the General Education Program, Academic Support Programs, Undergraduate Studies and ITS, and externally with the Massachusetts Library System, community colleges and public universities in the state of Massachusetts.

Healey Library Goal #3 (AY17-18): “Continue to develop and grow the unique primary sources in University Archives and Special Collections.”

The Library’s University Archives and Special Collections focused, as always, on accessioning significant, unique collections that align with the university’s mission and with the research and community-engaged interests of UMass Boston faculty. These included collections from the Dudley Street Neighborhood Initiative, an organization founded by community members in the Roxbury and Dorchester neighborhoods of Boston to address issues related to urban neighborhood development and

governmental disinvestment, and, in terms of UMass Boston history, the personal writings of UMass Boston Professor Emeritus of English Duncan Nelson, which comprise several thousand poetic odes that, together, tell a unique history of UMass Boston from the late 1960s to the present.

The department saw a 20% increase in archival accessions in AY17-18, and in addition processed 223 linear feet of archival collections that became newly available for research and study. In AY17-18, unique digital content in UASC's online repositories was accessed (viewed, downloaded, or streamed) approximately 421,901 times by researchers on campus and around the world. In AY17-18, UASC added 1,729 digital assets to our online repositories, and UASC began to develop and finalize digital preservation policies and foundational workflows, activities which will inform the department's goal-setting for AY18-19.

From September 2017 to July 2018, University Archives and Special Collections held 5 community-based, participatory archiving events in a number of communities in Massachusetts as part of our Mass. Memories Road Show program. Through these events, the program collected 1,230 digital or digitized images, photographs and stories from 522 individuals and involved collaborations with the Boston Public Library and members of the Boston and Massachusetts hip-hop community to host "*Show 'Em Watcha Got*" Mass. Memories Road Show: Hip-Hop Edition and with a number of organizations in the greater Boston area to coordinate a *Chinese American Experiences Mass. Memories Road Show*, which was held in Boston's Chinatown and documented the lives of Chinese residents of Boston over several generations.

These activities were particularly aligned with the following campus strategic goals:

Campus Goal 1: Advance student success and development

This past academic year, nearly 60 undergraduate and graduate students from a range of departments on campus were afforded the opportunity to engage in real-world, hands-on experience with community-based archival and preservation work. Additionally, by collaborating closely with UMass Boston faculty to offer focused, discipline-specific and meaningful engagement with archival materials, UASC's Archival Instruction program advances student success and development in important ways. For example, rather than have students learn about archival, primary source research through rote, standardized processes, Healey Library archivists work more directly with faculty members across campus to develop archival instruction sessions that align with and augment faculty-guided student learning goals.

Campus Goal 4: Establish a financial resources model consistent with the university's vision statement:

The *Mass. Memories Road Show: Hip-Hop Edition* event was funded in part by a major grant from the National Endowment for the Humanities' Common Heritage program. This grant covered a range of expenditures that might otherwise be incurred by the Healey Library, as well as temporary staffing to support event-planning activities and collection processing work, and ongoing collecting and community-engaged work around our Massachusetts Hip-Hop Archive during the grant period.

Healey Library Goal #4 (AY17-18): *Stabilizing the Library's foundational activities, resources and services*

This additional goal for AY17-18 was embraced by the Library in the early days of the academic year in response to the campus' financial and organizational challenges: Through careful stewardship and collections analysis, and thanks to campus support in setting its budget allocation, the Library was able to reinstate some of the essential research resources that had been cut or suspended the previous year,

and to fulfill a handful of outstanding faculty requests for new books and journal subscriptions. These practices set a foundation for Healey Library to continue to rebuild its core resources and services to fully support the campus' academic, research and pedagogic activities.

In response to the reduced staffing level that resulted from two retirements (VSIP), one layoff and one resignation, the Library made necessary adjustments to maintain a high level of responsiveness and productivity, calling upon staff dedication and willingness to work collaboratively across departmental lines. Electronic resources management was ably taken up by an ad hoc working group pending the hire of an Electronic Resources Librarian (in process). Reporting lines were clarified for Circulation and Interlibrary Loan departments, and an additional line was approved to hire a Systems and Applications Developer. Collection development is being managed by an experienced librarian who had retired several years ago and returned to provide essential assistance in analyzing collections, vendor offerings and faculty needs to guide acquisitions and renewals. This is a part-time, temporary solution for one of several serious staffing needs in the Library.

In August 2017, the Library hired a new head for the Library Business Office (Assistant Dean for Administration and Finance) and began the process of recovering from a six-month vacancy in that position in a way that could sustain and strengthen the Library during the campus-wide budget challenges. Throughout the year, the Library has demonstrated effective and efficient stewardship of its financial resources, using evidence-based decision-making to reinstate resources that had temporarily been cut or suspended and pursuing consortial and group purchasing agreements to maximize cost-effectiveness and breadth of the resources we offer to the campus community.

Other Major Library Achievements for AY 2017-2018

- **Achievement: Interlibrary Loan (ILL)** is a critical service and function of an academic research library, allowing students and faculty to be connected to a global network of critical information resources. In AY17-18, the ILL department received, on behalf of its patrons, 11,248 resources borrowed from 49 states, 4 continents, and 16 countries.

As one ILL user says, "ILL is an essential, in fact critical, resource that allows me to access relevant literature for my research group. I am mentoring 5 PhD students and 3 undergraduates in the chemistry department. Their undergraduate and PhD dissertations would not be complete without having access to ILL, and of course the same can be said for my publications and grant applications." In Spring 2018, the library distributed a survey to all active users of ILL services, receiving over 200 responses. Responses from the survey will be used to further enhance ILL services in the coming academic year. With the investment of campus carryover capital funds, the Library was able to significantly upgrade its ILL scanning equipment for this critical service, resulting in improved quality in document scans, improved workflow efficiency and reduced operation costs.

- **Achievement:** Healey Library was notably successful in applying for and receiving **external grant funding**, four awards in FY18 totaling \$48,816:
 - Mass Humanities Research Inventory Grant: \$2,000 July 2017

○ NEH Preservation Assistance Grant:	\$6,000	December 2017
○ NEH Common Heritage Grant:	\$12,000	December 2017
○ LYRASIS Catalyst Fund award:	\$25,816	June 2018

The progressive growth in size of the funded proposals is an indication that the Library's track record as an awardee is being recognized by funders and demonstrates potential for growth in future external funding awards. Most recently, the Library was selected as a finalist and invited to submit a full proposal for a \$250,000 award from the Institute of Museum and Library Services (IMLS), with award notification due in September 2018.

- Achievement:** In AY17-18, Healey Library created a new department, **Library Systems and Discovery Services (LSDS)**, to shepherd the Library's increasingly complex technology needs and initiatives.

In addition to overseeing and coordinating the Alma and Primo implementation and migration project, the LSDS department initiated and led other projects that are crucial to enhancing library systems and services, including: the successful implementation of the EZproxy Single Sign-On (SSO), which replaces outdated library barcodes with a more secure and efficient library login; the redesign of the Library homepage to make library resources more accessible on mobile devices; and the establishment and growth of collaborative partnerships with UMass Boston and UMass system IT staff. Each of the projects the LSDS department is addressing represents a long-standing need that the Library has not had the human or financial resources to pursue until the LSDS department was established.
- Achievement:** The Technical Services department added new 36,371 catalog records and updated 8,919 records in the catalog over the course of AY17-18, and continued to clean and improve data to support discoverability and access in the new Alma/Primo system.
- Achievement:** In AY17-18, Healey Library joined with the other four UMass system academic libraries to **negotiate a joint contract with Elsevier**, the vendor of many of the top scientific journals (and also one of the most expensive vendors on the market). By negotiating jointly, all five UMass Libraries were able to secure access to the same extensive suite of scientific journal titles, with each Library paying a percentage of the contract cost based on campus FTE counts. This process allowed Healey Library to offer enhanced access to journal titles that we ordinarily would not be able to afford in our subscriptions budget. In addition, Healey Library joined the system-wide Effectiveness and Efficiencies Committee established for the directors/deans of the five UMass system libraries in order to explore further opportunities for joint negotiations and efficiencies.

Healey Library's Significant Strengths

- Strength: Healey Library's dedicated, resourceful, agile and accomplished staff** successfully deliver foundational and transformative resources and services to the campus community in support of campus goals #1, #2 and #3.

Example: the migration to Alma and Primo required an 11-member steering committee and exceptionally strong leadership, all drawn from Library staff. Each steering

committee member served multiple essential roles, providing leadership both within the committee and within the Library's cross-functional teams with whom they worked closely to advance the work of the migration. During this monumental project, each Healey Library staff member was asked to take on tasks that were completely new to them, and each staff member tackled this challenge with aplomb, leading to a notably smooth migration and launch.

- **Strength: Healey Library actively participates in a number of academic consortia** which connect the Library to benefits such as cross-institutional working groups addressing unified goals for academic library resources and services, free or low-cost professional development opportunities, access to external funding opportunities, and cost-saving resource sharing and collective purchasing agreements. These advantages all support campus goal #4.
 - Consortial memberships:
 - Boston Library Consortium (BLC)
 - Massachusetts Commonwealth Consortium of Libraries in Public Higher Education Institutions (MCCLPHEI)
 - Fenway Library Organization (FLO)
 - UMass system "Efficiency and Effectiveness Committee" convened by the President's Office for the five system libraries to identify opportunities for financial efficiencies.
 - Westchester Academic Library Directors Organization (WALDO)
 - LYRASIS
 - NorthEast Regional Libraries consortium (NERL)

- **Strength: Creative resource management** has helped to mitigate budget constraints and has contributed to staff development.

Example: having lost four staff to retirement, resignation and layoff, the Library had no one left with the necessary expertise to manage its complex network of electronic resources via the new Alma/Primo platform. In response, an internal "Electronic Resources Management Working Group" was convened, comprised of staff from seven different functional areas in the Library. Despite having little or no previous experience managing these complicated tasks, the members of the committee quickly developed a usable process for collecting, tracking and troubleshooting reported issues, and established processes and procedures that have maintained electronic resource access for Healey Library patrons pending the hire of a full-time Electronic Resources Librarian in FY19.

- **Strength: Thanks to the support of the Provost's Office**, in AY17-18, Healey Library was approved for two critical, long-overdue new hires: the aforementioned Electronic Resources Librarian and a Library Systems Applications Developer.

Both of these positions will help to expand the capacity for the critical library infrastructure work led by the Library Systems and Discovery Services department, allowing Healey Library to truly match its peers in the management, storage and discoverability of library resources. The approval for these new hires, as well as the approval of a part-time, temporary Collection Development Librarian position, are indications of the support the Library has received from the Provost's Office in recognition of the Library's central role in fulfilling the campus' academic mission and goals.

Healey Library's Significant Weaknesses and Challenges

- **Weakness/Challenge: Subscription contracts and licensing roadblocks:** given that 96% of the Library's non-payroll budget is spent on journal subscriptions, books and other research resources, most of which need to be renewed annually, it is critically important that the Library's business office and the campus procurement office interoperate efficiently and effectively. A range of issues in the procurement process in AY17-18 resulted in suspended subscriptions, delinquency in payments to vendors and the Library's inability to spend its full non-payroll budget allocation within FY deadlines, even though the expenditures were for key research resources. To mitigate these issues, the Library looks forward to working with Administration and Finance to explore ways to ensure timely approval and processing of license agreements and the corresponding purchase orders for library resources.
- **Weakness/Challenge: Inadequate staff levels:** IPEDS data demonstrate that Healey Library is significantly understaffed compared to our peer institutions, even after controlling for variances in student enrollment. Although Healey Library is serving more students (20% more) and faculty (22% more) than the University of Maryland Baltimore County (its aspirational peer), it does so with a much smaller library staff (43% fewer), according to 2017 IPEDS data. The Library was not approved to fill any current vacancies in FY19, which will exacerbate the existing problems of staffing the Library to provide adequate services and resources. Low staff levels leave the Library unable to address some needs or perform some functions that are considered essential in a research library environment. These staffing challenges become even more apparent in discussions to plan how the Library will best serve a 24/7 student population with the opening of the dorms in Fall 2018.

Although the number of library instruction sessions taught by Healey librarians has decreased proportionately to the decrease in departmental staffing over the last three academic years, instruction librarians continue to carry heavy teaching loads, with the average number of information literacy sessions per librarian (approximately 100 sessions per librarian per year) remaining relatively stable. An adequately staffed instruction team would be well poised to meet the increasing demands for research and information literacy instruction that will be posed by the growth in the student body and by the evolving needs of the UMass Boston campus community.

The Collection Development Librarian position is currently filled by a part-time, temporary staff person whose contributions are exceptional but whose necessarily limited hours present challenges for business continuity and project management.

The University Archives and Special Collections is entering its second year of being down one team member, even though the department is fielding reference inquiries and new accessions at the same rate as in the previous AY and the archival instruction program has grown by 53% over the previous AY.

The Technical Services Department lost two of its three staff to layoff and VSIP retirement in early AY17-18, which added significantly to the workload of the one remaining staff member in the department.

The LSDS department has been managing the implementation and maintenance of the Library's core systems and technologies with one full-time staff which, in an appropriately provisioned academic library, would involve three, four or more dedicated staff. With the increasingly complex technology needs and initiatives and the extensive efforts required for ongoing maintenance of new Alma and Primo system, the challenge has become even more apparent, and LSDS is faced with the limitation of the number of new and existing projects the Library can take on, given the inadequate staffing levels. To mitigate this challenge, the Library is in the process of hiring two staff members to serve critical roles in the LSDS department.

- Weakness/Challenge: Unique Budgetary Considerations for Academic Libraries:** The Library budget is uniquely challenged by the complexities of the 21st century information marketplace. Annual inflation requires the Library to budget a 6-7% increase every year simply to maintain access to the campus' current research resource holdings. Additional market monopolization and vendor vagaries such as journal bundling present budgetary challenges that are distinct and unique to libraries.
- Weakness/Challenge: Insufficient library holdings:** the Library's acquisitions budget was reduced by 65% between FY16 and FY17 (from \$437,861 to \$151,519) and again by 87% from FY17 to FY18 (\$151,519 to \$20,000). This confirms IPEDS data from 2016 and 2017 showing that UMass Boston lags significantly behind its peers in purchasing physical books, media and serials. The Library's collection of over 410,000 physical items is just over half the number of physical items held by our aspirational peer (UMBC). These physical items were checked out from Healey Library 25,000 times in AY16-17 (the latest IPEDS figures available for comparison), but this activity is still 35% lower than the physical checkouts of our aspirational peer. In addition, IPEDS data summarizing interlibrary loan (ILL) activity in AY16-17 show that UMass Boston borrowed more than twice the number of items that it loaned, and in AY17-18, following campus-wide budget cutbacks, this ratio increased significantly, with UMass Boston borrowing nearly three times as many items as it loaned: 4,450 items loaned compared to 11,248 items borrowed. These numbers are clear indicators that UMass Boston's existing collections and subscriptions do not meet the needs of the campus community. The Library is mitigating these challenges by maximizing our efforts in providing electronic resources for our campus community and capping our ILL services to stay under a designated cost-per-transaction threshold, which at times has the undesirable result of leaving the Library unable to fulfill the request of a faculty, staff or student. Future mitigation efforts will be possible as the Library's acquisition budget is restored to levels that are acceptable for an academic research library and comparable to our peers.
- Weakness/Challenge: Inadequate campus communications channels:** Since the Library's services and resources are part of the critical infrastructure supporting teaching and research at UMass Boston, Healey Library needs access to a reliable campus communications channel that can efficiently reach all members of the campus community (faculty, staff and students). Such a channel does not currently exist, requiring inadequate mitigation efforts to create home-grown lists and make separate requests to send information out to different campus constituencies.
- Weakness/Challenge: Deficiencies in the physical plant:** Healey Library is not included in the campus REAB project although it suffers from problems that negatively impact students, staff

and collections. Mitigation of these problems is currently being handled with Facilities on a case-by-case basis.

HVAC in the Library is problematic to the point of interfering with work and study. Temperatures fluctuate dramatically throughout the year, with temperatures recorded in the low 50s or the low 90s for days at a time, depending on the season. Electricity cannot be readily extended to significant parts of the building, meaning that cables are hung down from the ceiling to wire study areas on the 4th floor, computers and other equipment cannot be located near the core of the building, floor outlets and cables are tripping hazards, etc. Insufficient lighting in the Library was cited in NEASC report summary as one of Healey's "resource challenges". There is no fire suppression system in the building, of the type designed to protect both people and collections. Carpeting is heavily worn, pulling up or frayed, constituting a tripping hazard in some areas. The four doorways on the plaza level are not adequately sealed or secured, allowing water leakage in rainy weather, and allowing patrons to exit the building without passing through the 2nd floor security gates. Finally, the specially-constructed vault that stores the Library's most fragile archival materials does not maintain the required temperature and humidity levels to prevent damage to those materials.

HEALEY LIBRARY'S AY 2018-2019 GOALS

For AY 18-19, Healey Library has aligned its goals directly with the strategic goals of the campus.

Healey Library Goal #1 (AY18-19): *Advance student success and development.*

Healey Library plays a leadership role in advancing student success and development at UMass Boston through its dynamic and collaborative instructional programming, which guides students through the complex processes of research, discovery, evaluation, critical thinking and ethical use of information. In support of this campus goal, in AY18-19 Healey Library will:

1. Continue to develop and enhance the functionality of the new library systems **Alma and Primo ("UMBrella")** while expanding interoperability with other library and University systems. The new system requires extensive effort to maintain, enhance and improve its features and to integrate additional resources for students and faculty through the "UMBrella" interface on the parts of several of the library's functional units.
2. Review and revise **the Library's instruction program**, based on assessment efforts, to improve students' critical thinking and research skills. Instructional program improvements will focus on: employing active learning pedagogies; serving both undergraduate and graduate students; creating engaging materials that can be deployed as standalone online modules, integrated with the campus learning platform and/or delivered as an aspect of face-to-face instruction; integrating educational technology that supports and enhances student learning; and increasing student engagement with unique archival primary sources.
3. Actively contribute to campus efforts to educate and inspire students to live up to the highest standards for **academic integrity** through collaboratively developing and sharing education and training materials.

EVALUATION INDICATORS: By the conclusion of AY18-19, Healey Library will:

- Integrate three external library systems (RapidILL, BrowZine, and link resolver) into Alma to enhance functionality
- Enable automatically generated patron reminders and notifications from Alma
- Increase the number of faculty utilizing Blackboard-embedded library research guides by 25% and revise 75% of the Library's existing lesson plans to capitalize on the pedagogical opportunities afforded by the Library's new active learning and teaching center
- Conduct a formal assessment of the Library's new active learning and teaching center and produce a report with recommendations for continued enhancements to the Library's teaching program
- Conduct online research consultations with at least five students via a web conferencing tool and generate a report summarizing the pros and cons of this approach
- Conduct a curriculum mapping exercise to identify opportunities to align archival instruction with faculty-guided student learning goals
- Compile, evaluate and share the results of the academic integrity assessment completed by students who have committed academic integrity violations, and implement revisions to the academic integrity assessment

Healey Library Goal #2 (AY18-19): *Enrich and expand academic programs and research.*

By providing the UMass Boston community with easy, efficient access to a wide range of high-quality primary and secondary information resources, Healey Library enriches and expands the academic programs and research activities on campus. In support of this campus goal, in AY18-19 Healey Library will:

1. Work with campus stakeholders to identify mechanisms that can help build **campus research resources** to a level that fully supports faculty, student and research activities on campus and that is aligned with peer institutions.
2. Offer research and information holdings that are responsive and relevant to the requirements of the UMass Boston community

EVALUATION INDICATORS: By the conclusion of AY18-19, Healey Library will:

- Work with relevant campus bodies to incorporate a thorough survey and analysis of library materials into the **approval process for proposed graduate programs**, including any specialized resources required by accrediting bodies
- Design and pilot a system to routinely collect **faculty feedback and recommendations for library acquisitions and subscriptions**

Healey Library Goal #3 (AY18-19): *Improve the learning, teaching, and working environment.*

The UMass Boston community relies on the Healey Library to provide extensive support for teaching, learning and research through its collections, services, staff, resources and study spaces. To meet this campus goal, Healey Library strives to improve UMass Boston's academic environment in the following ways in AY18-19:

1. Increase the **usage of all library resources** by expanding outreach, assessment, collection analysis and development efforts; piloting an enhanced document delivery service; and expanding campus-wide familiarity and use of UMBrella to include all members of the community (faculty, students, administration and staff).
2. Develop a **library-wide assessment culture** that will lead to a productive review of library services, user experiences and facilities.
3. Plan adequate **staffing and resource support levels for AY19-20**
4. Improve Library **staff access and expertise in using administrative tools**, software, cloud platforms and communications channels.
5. **Address deficiencies in the Library facility** that present risks to patron and staff productivity and safety, and to the adequate protection of library assets.

EVALUATION INDICATORS: By the conclusion of AY18-19, Healey Library will:

- Deliver a minimum of four UMBrella training workshops, each targeted to a different group or department on campus
- Pilot a campus-wide document delivery service using the campus mail system
- Develop a roadmap for library assessment activities; implement at least three internal assessment activities
- Provide training sessions for Healey Library staff for Google Drive, Microsoft OneDrive and Adobe Acrobat
- Produce an annual Healey Library Facilities Report identifying significant facilities issues and the actions taken by Healey Library staff to mitigate or resolve them

Healey Library Goal #4 (AY18-19): Establish a financial resources model consistent with the university's vision statement.

Healey Library has consistently proven itself to be an exceptional steward of its financial resources. To support the university's goals of establishing a responsible and aspirational financial resources model, the Library will focus particular attention on the following key areas in AY18-19:

1. **Streamline financial reporting** and implement effective and efficient workflows in line with campus A&F units.
2. Continue to work with multiple **consortial and UMass system partners** to lower resource costs as possible through collective contract negotiations and shared licensing.
3. Identify future **external funding opportunities** for Healey Library and its departmental initiatives; encourage all library departments to identify possible grant and donor funding to support their work
4. Establish Library protocols and workflows for **administering and reporting on grant-funded projects**

EVALUATION INDICATORS: By the conclusion of AY18-19, Healey Library will:

- Review and implement best options for improving turnaround on approvals for Library requisitions with contract and licensing implications
- Calculate the university funds saved through consortial licensing and subscriptions

- Increase the amount of external funding received to support Healey Library's projects by 3%, including at least one proposal for a functional unit that has not previously received external funding
- Develop, test and implement a workflow to streamline internal administration of grants awarded to the Library
- Contribute to the system Effectiveness & Efficiencies committee's goal-setting and collaborative negotiating efforts with library research resource vendors

Healey Library Goal #5 (AY18-19): *Develop an infrastructure supportive of the preceding goals.*

Healey Library's resources, services and staff serve as a critical academic and scholarly infrastructure for the entire campus community. In AY18-19, Healey Library will work to strengthen the information pipeline supporting campus teaching and research in the following critical service areas:

1. Develop the newly formed **Library Systems and Discovery Services department** through judicious resource management and strategic planning.
2. Continue to build **Healey Library staff competency with Alma and Primo.**
3. Establish effective **campus-wide communication strategies** in conjunction with existing campus resources and channels.
4. Expand and deepen **campus and university partnerships** and collaborations.

EVALUATION INDICATORS: By the conclusion of AY18-19, Healey Library will:

- Hire and train two full-time staff to expand the capacity of the Library Systems and Discovery Services department: Electronic Resources Librarian and Library Systems and Applications Developer
- Hire an additional part-time student assistant to support the critical infrastructure work of the Library Systems and Discovery Services department
- Establish a data collection plan to begin tracking UMBrella usage by the campus community
- Develop a work plan and timeline for integrating Healey Library's interlibrary loan system with Single-Sign On (SSO)
- Develop and implement a successful library outreach and communication plan that identifies both internal and external channels to reach as many UMass Boston community members as possible, as efficiently as possible
- Develop a public-facing data dashboard to communicate the impact of Healey Library's resources and services

Aspirational Peer Comparison

The University of Maryland Baltimore County (UMBC) was selected as Healey Library's overall aspirational peer based on its similar student body size, range of services and proximity to an urban center. The following chart is drawn from two sources: the Statistical Portraits produced by UMass Boston's Office of Institutional Research, Assessment, and Planning (OIRAP), and the Integrated Postsecondary Education Data System (IPEDS) data collected by the U.S. Department of Education. . These data document the following key points, with mitigations offered in the previous sections of this annual report.

- Healey Library is serving more students (20% more) and faculty (22% more) with a much smaller library staff (43% less).
- Healey Library has built a larger digital library collection (343% more). However, the total number of digital/electronic databases at Healey is much lower (68% less), which has a significant impact on the Library's ability to support learning, teaching and research at UMB.
- Healey has a much higher rate of digital circulations (1493% more), indicating the effectiveness and efficiency of Healey's digital library collections and strategies.
- The numbers of interlibrary loans received by Healey Library (111% more) and provided to other libraries (23% less) indicates that Healey relies on other libraries to support our users. Healey needs to build up its library collections to support the UMB students and faculty.
- The gaps in library budgets between UMB and UMBC (currently 3% less for one-time purchases and 37% less for continuing subscriptions) document Healey Library's need for additional support to build its holdings to levels that can adequately support the research, teaching and learning activities of UMass Boston's faculty and students.

	UMB	UMBC	Difference	% difference
Campus Population (FY 17) (1)				
Colleges and schools	10	7	+3	
# of students	16,415	13,662	+2,753	+20%
# of undergraduate	12,660	11,234	+1,426	+13%
# of graduate	3,755	2,428	+1,327	+55%
# of faculty	1146	938	+208	+22%
# of FT faculty	700	546	+154	+28%
# of PT faculty	446	292	+154	+53%
# of library staff	28	49	-21	-43%
Library collections (FY 16) (2)				
# of physical books (AL2016)	394,383	727,421	-333,028	-46%
# of physical media (AL2016)	6,105	26,459	-20,453	-77%
# of physical serials (AL2016)	10,194	27,505	-17,311	-63%
Total physical library collections (books media and serials) (AL2016)	410,682	781,385	-370,703	-48%
# of digital/electronic books (AL2016)	703,771	171,487	+532,284	+310%
# of digital/electronic databases (AL2016)	124	388	-264	-68%
# of digital/electronic media (AL2016)	119,716	12,136	+107,580	+886%
# of electronic serials (AL2016)	54,798	14,296	+40,502	+283%
Total electronic library collections (books databases media and serials) (AL2016)	878,409	198,307	+680,102	+343%
Total library collections (physical and electronic) (AL2016)	1,289,091	979,692	+309,399	+31%
Library services				
# of physical library circulations	25,597	39,099	-13,502	-35%
# of digital/electronic library circulations	2,459,145	154,295	+2,304,851	+1493%
# of interlibrary loans provided	6,192	8,053	+7,097	-23%
# of interlibrary loans received	13,466	6,369		+111%

Library budgets				
One-time purchases of books, serial backfiles and other materials (AL2016)	437,861	450,825	-12,694	-3%
Ongoing commitments to subscriptions (AL2016)	2,291,526	3,632,574	-1,341,048	-37%
Total operations and maintenance expenditures (AL2016)	705,489	622,778	+82,711	+14%

Data sources:

1. University of Massachusetts Boston, Office of Institutional Research, Assessment, and Planning (OIRAP). Statistical Portraits. Retrieved from https://www.umb.edu/oirap/statistical_portraits
2. U.S. Department of Education. Institute of Education Sciences, National Center for Education Statistics. Integrated Postsecondary Education Data System (IPEDS). Retrieved from <https://nces.ed.gov/ipeds/use-the-data>.

ORGANIZATIONAL CHART

