



THE JOSEPH P. HEALEY LIBRARY

UNIVERSITY ARCHIVES &
SPECIAL COLLECTIONS

PARTNERS IN TEACHING, SCHOLARSHIP, AND SERVICE

University Libraries 2016-2017

**connecting the dots:
from information to
transformative knowledge**

DANIEL A. ORTIZ-ZAPATA, D.A.
DEAN OF UNIVERSITY LIBRARIES

From the Dean...

This year, the team at the University Libraries provided integral intellectual property and information services to the entire campus and global community under a new theme: "Connecting the Dots: From Information to Transformative Knowledge." This theme captures the vibrant movement to develop state-of-the-art Library and IT services on campus amidst both unprecedented growth and unprecedented challenges, within a highly limited framework of resources and staffing.

This theme also represents how librarians and library staff offer critical facilitation and navigational support for instructional and research endeavors across campus, both directly and indirectly. The foundational work of the library staff paves the way for a campus community wrestling with a constant and unrelenting stream of information from all corners of our technological worlds. Using evidence-based approaches and a new, proactive, participatory service model, library staff offer resources and support that help students, faculty, staff, and community partners make sense of the information flood and use the intricacies of the digital age to their advantage.

This year's theme also points to the changing trajectory of library information technology. A state-of-the-art back-end library system and front-end library search tool will be in place in January 2018, offering users the chance, finally, to search the library's catalog and databases from a single, smart-search interface. In tandem with these system improvements, librarians continue to transform their library research instruction program to an online environment, allowing the University Libraries to better serve the needs of a 24/7/365 campus.

Much of what was done this year is essential groundwork for what will be accomplished in 2018, which promises to be even more thought-provoking than 2017. The University Libraries, which have always offered an innovative model of intellectual property procurement, will have to continue to explore creative avenues to connect patrons with the resources they need for teaching and scholarship. In these efforts, and in all others, University Library staff look forward to working with faculty, staff, students, and community partners as collaborators and co-creators in this ever-shifting landscape of transformation.



Daniel A. Ortiz-Zapata, D.A.
Dean of University Libraries

How Are We Doing?

Progress report on University Libraries' 2016–2017 goals

GOAL 1: Implement State-of-the-Art Library System and Discovery Tools: Alma and Primo



PROGRESS

- Hired Deputy Director for Library Systems, Technology, and Discovery Applications
- Secured funding
- Strengthened partnerships with University Information Technology Services
- Established executive leadership team, working groups, and communication and change management plans

NEXT STEPS

- August 2017: Implementation phase begins
- January 2018: Anticipated "Go Live" date

GOAL 2: Build a "Common Ground" Library Service Model



PROGRESS

- Cross-trained library staff for business continuity
- Improved communications between front-desk service points and departmental staff

NEXT STEPS

- Identify a single location for a one-stop collocation of library public services

GOAL 3: Expand campus, community, and global partnerships



PROGRESS

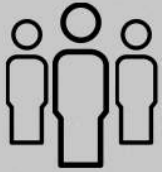
- Established a formal partnership with the Boston Public Library for the support and development of the Massachusetts Hip-Hop Archive
- Partnered with Massachusetts community colleges to build bridge programs for student success

NEXT STEPS

- Revamp the Library Liaison Program for enhanced communications and collaboration

University Libraries by the Numbers

In Academic Year 2016-2017...



436,000

In-person library visitors



377,000

Open Access Library hits



8,000

Student attendance in library classes and workshops



24,000

Items borrowed



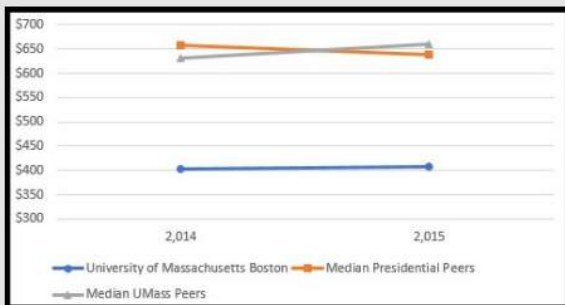
19,000

Interlibrary loans exchanged with 50 states and 18 countries

The Libraries serve 26,200 registered users (students, faculty, and staff)

Resourceful Transformation

Library Expenditures per Student FTE



The University Libraries offer transformative resources and services despite the lowest ratio of library expenditures per student FTE of all UMass sister schools and identified peer institutions.



16 Librarians and Professional Staff
15 Paraprofessional Staff



\$2.7 million

Annual budget for library materials

Research Support



9% growth in questions in 2 years
6% growth in face-to-face questions
14% growth in virtual reference questions

The Libraries That Never Sleep



764,000

Library website page views



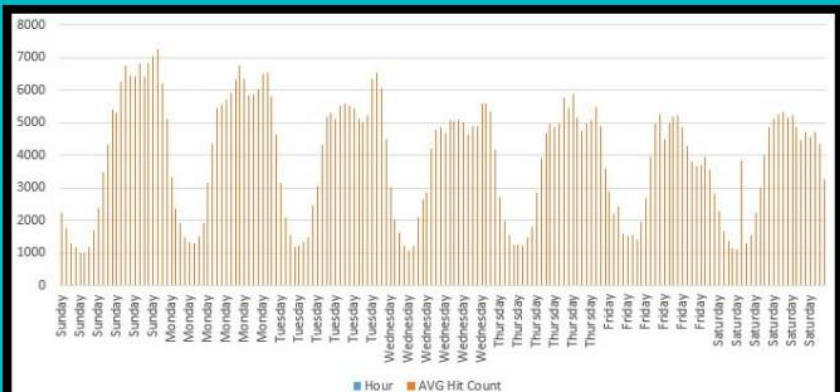
5.5 Million

E-book and streaming video hits



965,000








Article downloads



University Libraries' online research resources record web traffic around the clock: 24 hours a day, 7 days a week

Scholarship

To support transformative partnerships and projects that further both the Libraries' and UMass Boston's urban missions, the Libraries sought project funding from a variety of public and private sources. The proposed projects listed below demonstrate not just impactful scholarship but also powerful collaborations with community partners such as the Boston Public Library and local artists.

Grant	Project	Awarded	Submitted	Not Awarded
Creative City (New England Foundation for the Arts)	<i>Mother/Father Wit: Life Lessons from Elders</i> (with local artist Valerie Stephens)			
Creative Economy Initiatives Fund (UMass President's Office)	<i>Massachusetts Hip-Hop Archive: Transitional Funding for Oral Histories and Strategic Planning</i>			
Research Inventory Grant (Mass Humanities)	<i>Theresa-India Young's Papers: Documenting Art, Education, Cultural Heritage, and Community in Boston</i>			
Preservation Assistance Grant (National Endowment for the Humanities)	<i>Collection Assessment and Training for the University Archives and Special Collections at University of Massachusetts Boston</i>			
Common Heritage Grant (National Endowment for the Humanities)	<i>Local Rappers, DJs, B-Boys, and Graff: Documenting the Massachusetts Hip-Hop Community from the 1970s to the Present</i>			
Gladys Brooks Foundation	<i>The Mass. Memories Road Show: Building a Participatory Archiving Toolkit</i>			
Catalyst Fund (LYRASIS)	<i>Expanding the Mass. Memories Road Show</i>			 Finalist

Scholarship, continued

UMass Boston Librarians continue to engage in a broad range of scholarly activities at the local, national, and international level, contributing both to the development of the library, archival, and information professions and to the advancement of UMass Boston.

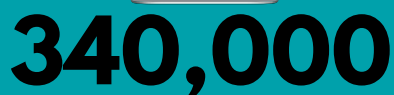
SELECTED SCHOLARSHIP BY UNIVERSITY LIBRARIANS			
 <p>Teresa Maceira Head of Reference, Outreach, and Instruction</p>	 <p>Danitta Wong Head of Collection Development and Assessment</p>	<p>Beyond Passive Learning: Utilizing Active Learning Tools for Engagement, Reflection, and Creation</p> <p>published in <i>Mobile Technology and Academic Libraries: Innovative Services for Research and Learning</i>. Canuel, Robin, and Chad Crichton, editors. American Library Association (2017)</p>	
 <p>Meghan Bailey Processing Archivist</p>	<p>Processing Manual for Archival and Manuscript Collections</p> <p>published on <i>ScholarWorks</i>, revised 2017 with co-authors Jessica Holden, Reference Archivist, and Joanne Riley, University Archivist and Curator of Special Collections</p>	 <p>Jenny Moyryla Instructional Services Librarian</p>	<p>Healey Library: OER Resources and Support</p> <p>presented at <i>Save Students \$\$\$, Teach with OER Content</i> (2017)</p> <p>Panelist on Open Education discussion at <i>UMass Academic Innovation Conference</i> (2017)</p>
 <p>Yueqing Chen Deputy Director for Library Technology, Systems, and Discovery Applications</p>	<p>Healey Library – New Search & Discovery Tool: Designed to Meet Your Teaching & Research Needs</p> <p>presented at the <i>University Conference on Teaching, Learning, and Technology</i> (2017)</p>	 <p>Tina Mullins Reference Services Coordinator</p>	<p>Academic E-Books</p> <p>presented to OCLC QuestionPoint user group (2016)</p>
 <p>Andrew Elder Digital Archives and Outreach Librarian</p>	<p>The Mass. Memories Road Show</p> <p>presented at <i>Association of College and Research Libraries – New England Chapter's DigiCamp</i> (2017) with Carolyn Goldstein, Public History & Community Archives Program Manager</p>	 <p>Xuan Pang Head of Resource Sharing and Document Delivery</p>	<p>Academic Efficiencies and Effectiveness at Healey Library and Piloting a 'Common Ground' Library Service Model</p> <p>presented at <i>UMass Academic Innovation Conference</i> (2017) with Danitta Wong, Head of Collection Development and Assessment</p>
 <p>Jessica Holden Reference Archivist</p>	<p>Editorial board member for <i>Journal of Contemporary Archival Studies</i></p> <p>Senior editor of <i>New England Archivists Newsletter</i></p>	 <p>Joanne Riley University Archivist and Curator of Special Collections</p>	<p>Participatory Engagement in Digital Humanities Projects</p> <p>awarded a fully-funded scholarship to attend a digital humanities master class at The National University of Ireland, Maynooth (2017)</p>
 <p>Iris Jahng Pedagogy and Learning Design Librarian</p>	<p>Assessing Student Learning with What You Already Use</p> <p>published in <i>Association of College and Research Library's Instruction Section Newsletter</i> (2017)</p> <p>Collaborative Assessment of Student Learning: A Tale of Two Departments</p> <p>presented at <i>New England AiA Assessment in Action Symposium</i> (2016) with Cecilia Sirigos, Pedagogy and Learning Design Librarian</p>	 <p>Lisa Romano Head of Technical Services</p>	<p>Service Requirements for Promotion and Tenure: What Is the Technical Services Librarian to Do?</p> <p>published in <i>Library Collections, Acquisitions, and Technical Services</i> (2016)</p> <p>Columnist for <i>Technical Services Quarterly</i> and <i>Online Audiovisual Catalogers (OLAC) Newsletter</i></p>
 <p>Teresa Maceira Head of Reference, Outreach, and Instruction</p>	<p>Teaching Writing & Research in the Humanities at a Chinese University: What It Can Teach Us about Working with International Students in an American Composition Classroom</p> <p>presented at <i>Engaging Practices: A UMB Conference on Teaching Composition</i> (2017)</p> <p>Research in the Composition Classroom in a Post-Truth Age</p> <p>presented at the <i>University Conference on Teaching, Learning, and Technology</i> (2017)</p> <p>Learning with iPads in the Classroom</p> <p>filmed for UMass Boston's YouTube channel</p>	 <p>Cecilia Sirigos Pedagogy and Learning Design Librarian</p>	<p>Bridging Divergent Information Literacy Needs: Cross-Institutional Collaboration to Support Transfers</p> <p>presented at <i>MCCLPHEI Assessment Workshop</i> (2017)</p>
 <p>Mary Moser Deputy Manager for Outreach, Marketing, Fundraising, and Grants</p>	<p>Act Like a Librarian, Think Like a Fundraiser</p> <p>presented at the <i>Association of College and Research Libraries – New England Chapter Annual Conference</i> (2017)</p> <p>Editorial board member for <i>Internet Reference Services Quarterly (IRSQ)</i></p>	 <p>Danitta Wong Head of Collection Development and Assessment</p>	<p>Promoting Library Resources</p> <p>presented at the <i>American Association for the Advancement of Science (AAAS) Annual Meeting</i> (2017)</p> <p>Library Connections: Library Research Instruction Collaborations at UMass Boston and Area Community Colleges</p> <p>presented at <i>UMass Academic Innovation Conference</i> (2017) with Cecilia Sirigos, Pedagogy and Learning Design Librarian</p>

<http://scholarworks.umb.edu>

World map showing the number of people per country who have visited the United States. The map uses colored circles to represent the count for each country. The United States has the highest count at 110,000, followed by Germany at 25,816 and the United Kingdom at 22,150. Other countries with significant counts include China (18,690), Japan (6,525), and India (4,949). The map also shows the number of people who have visited the United States from each country, with the United States being the most common origin at 54,407. The map is sourced from Google and includes a copyright notice for 2017.

Country	Number of People
United States	110,000
Germany	25,816
United Kingdom	22,150
China	18,690
Japan	6,525
India	4,949
France	4,598
Italy	4,321
Spain	4,321
Canada	4,321
South Korea	4,321
Thailand	4,321
Indonesia	4,321
Papua New Guinea	4,321
Australia	4,321
New Zealand	4,321
South Africa	4,321
Madagascar	4,321
Argentina	4,321
Chile	4,321
Bolivia	4,321
Venezuela	4,321
Colombia	4,321
Mexico	4,321
United States (Origin)	54,407

Usage Comparison of University Libraries' Resources



The figure consists of two maps of Africa, each showing the distribution of digital resource usage by country. The left map is titled 'Use of Licensed E-Resources' and the right map is titled 'Open Access Downloads'. Both maps use a color scale from light green to dark green to represent the level of usage.

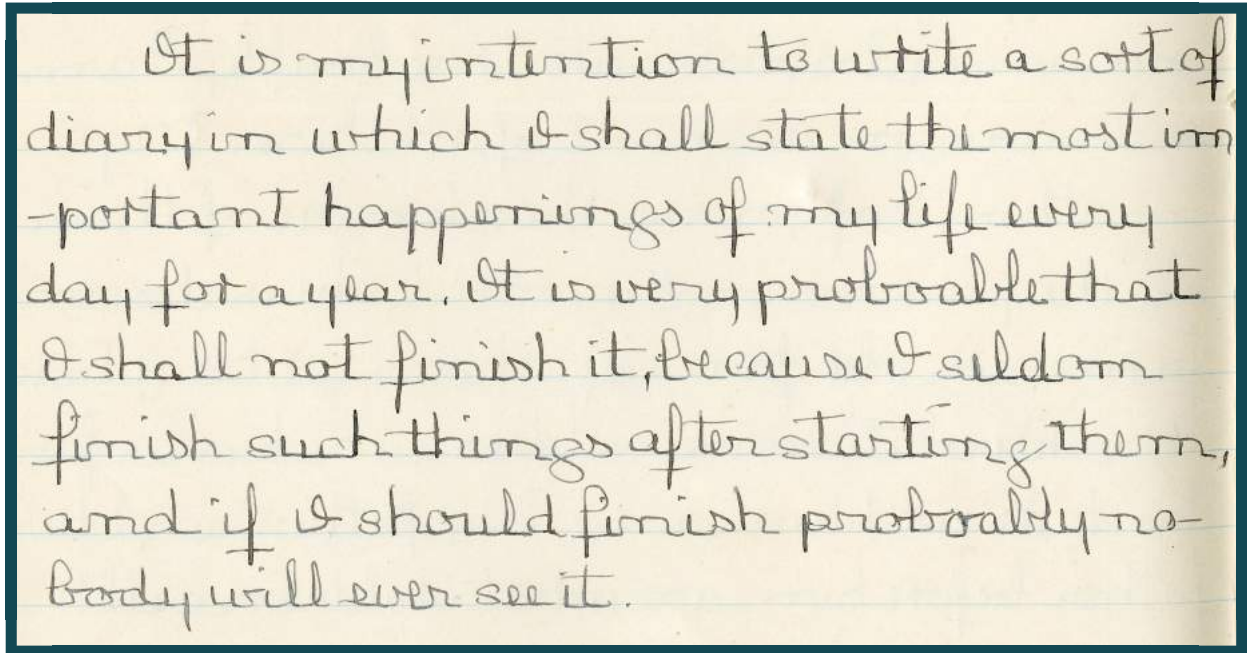
Country	Use of Licensed E-Resources (Relative Level)	Open Access Downloads (Relative Level)
Algeria	High	Low
Libya	High	Low
Egypt	High	Low
Sudan	High	Low
Ethiopia	High	Low
Somalia	High	Low
Kenya	High	Low
Uganda	High	Low
Rwanda	High	Low
Burundi	High	Low
Tanzania	High	Low
Malawi	High	Low
Mozambique	High	Low
Swaziland	High	Low
Botswana	High	Low
Namibia	High	Low
South Africa	High	Low
Lesotho	High	Low
Madagascar	High	Low
Senegal	Low	High
Gambia	Low	High
Sierra Leone	Low	High
Liberia	Low	High
Ivory Coast	Low	High
Ghana	Low	High
Togo	Low	High
Benin	Low	High
Nigeria	Low	High
Cameroon	Low	High
Congo	Low	High
Zambia	Low	High
Angola	Low	High
Mali	Low	High
Niger	Low	High
Chad	Low	High
Sudan	High	Low

UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expression

Transformative Library Teaching: Uncovering New Pathways for Learning

Historical Research

Joanne Riley and Andrew Elder, from the University Archives and Special Collections, co-taught a seminar in the Honors College that helped students discover archival research practices. Students transcribed the diary of a Dorchester teenager from the early 1900s and pursued original historical research questions that arose from the topics discussed in the diary. The course was covered by WGHB's The Curiosity Desk program.



A page from Albert Healey's first diary entry, dated January 1, 1903

Community College Bridge Programs

Bunker Hill Community College

- The pilot initiative for University Libraries' community college collaborations
- Second-year science-major students at BHCC came to UMass Boston to learn how to use science research databases
- In their final course presentations, students consistently and specifically cited research database access as a factor that enhanced their learning in the course and better prepared them to transition to four-year schools the following year

Learning Outcomes Alignment

- Based on the success with BHCC, UMass Boston Librarians are partnering with librarians at UMass Boston's feeder schools to develop a shared set of learning goals

"One of the most remarkable end results of having my students able to come to UMass Boston for an introduction to library resources has been the depth with which my students have been able to research their final topics. I have been amazed at how much more my students have been able to do when the barrier to accessing papers is lower. I am blown away by how dramatic that difference is for my students."

Professor Karen Atkinson, Bunker Hill Community College

Transformative Library Teaching: Students as Investigators and Creators

"The growing pedagogical literature on the overlap between mobile technology and information literacy inspired the authors to actively use [iPads and apps] to empower the information-literate individual to produce information. The authors noted the beneficial outcomes in integrating technology into information literacy classes with regard to the level of engagement, creativity, and reflection from the participants in active learning scenarios. First, the tools engage students in active learning tasks so that more time is spent practicing skills than passively receiving information in lectures...Being mobile impacted the level of engagement, as Havelka (2013) observed that the realignment of the physical space while using an iPad allowed for more face-to-face interactions among students, faculty, and librarians while they shared devices in a collaborative and synchronous environment. Moreover, reticent students, who would normally be slow or unresponsive to oral queries from librarians, had an opportunity to engage through written responses using technology. Secondly, the authors observed evidence of creativity in the students' products and in the thoughtful integration of different applications in information literacy classes. Finally, the benefit of increased reflection resulted from the process of students responding to questions...in parallel to the participatory digital environments in their daily lives. Using these tools, the students read, created, and commented on other students' responses about the classroom concepts and activities in the same way that they regularly interact with user-generated content in the form of Wikipedia, Facebook, Twitter, and comments at the end of online articles."

Excerpted from UMass Boston Librarians Teresa Maceira's and Danitta Wong's book chapter: "Beyond Passive Learning: Utilizing Active Learning Tools for Engagement, Reflection, and Creation."



Teresa Maceira, Head of Reference, Outreach, and Instruction, helps students evaluate and engage with primary source materials in a research instruction session

From Our Users...

"The centrality of Healey Library to my teaching and research stands out as an area of strength in my experience at UMass Boston. I first discovered Healey Library while teaching a class called Community Portraits. While teaching the use of the Census in this class, I had the support of a truly dedicated Healey Librarian who conducted Census workshops for my students. What a great service! By 1990, the digital revolution opened a new world for research and teaching. We were fortunate that Healey Library's staff and leadership recognized this shift very early and moved expeditiously to become the resource we all have come to expect. By the 2000s, with increasing digital sources, I was able to support students by assigning textbooks, primary sources, and other materials in digital form, saving them money. It was also in the 2000s that I began teaching online. Without the help of Healey Library, online teaching would have been neither possible nor desirable. When Healey Library is at the center of the University's plans for improvement, we continue to provide our students and faculty with their best source of support. For UMass Boston to thrive in the future, a strong digital library is an absolute necessity."

Luis Aponte-Parés
Retired Associate Professor

"The most important part of any research campus is the library, its resources, and how it helps promote research at all levels. Over the decades, Healey Library has remade itself to accommodate the changing uses of the library. While it was once an information repository the faculty (and students) visited whenever they had research endeavors, or to just read the latest issues of the journals and peruse the new books, this changed with the availability of online journals and search engines. It was then that the library first remade itself to offer services that are unavailable elsewhere, to foment research and services that are unattainable for scholars and litterateurs. Subsequently, as more changes occurred within the research landscape, the library has remade itself multiple times, through such services as critical library research instruction embedded in the General Education curriculum, and a robust interlibrary loan network that connects patrons to resources from all over the world. Healey Library's University Archives and Special Collections serve scholars and researchers who need to access unique collections that are only accessible at Healey Library. Healey Library saves users time and opens new vistas for research that the user might not even know exist."

Steve Ackerman
Associate Professor

Challenges

This year, the University Libraries encountered powerful challenges related to the larger budgetary constraints of UMass Boston. Some of these challenges allowed the Libraries to refine their practice and emerge with leaner, more efficient procedures in place. Other challenges, such as the mandated reductions in intellectual property and the discontinuing of purchasing programs, are proving difficult to counter and will require the partnership of the entire UMass Boston community to chart the most strategic path forward.

Resource Loss

- 22 databases were canceled mid-year
- Libraries had to cease all purchasing of new and requested items
- Libraries experienced limits on their ability to procure requested resources from other channels

Internal and External Communications

- University Libraries devoted significant time to developing understanding among the faculty and community at large regarding library cutbacks
- Library database cuts received high-level media attention, such as in the Boston Globe and Library Journal
- Faculty perceived resource cuts as targeting particular disciplines

"Ultimately, this is a loss that affects the faculty and students in immeasurable ways. It seems unfair to have expectations that faculty will be research productive, for the sake of personnel reviews and grant funding, when we do not have the most basic access to the materials we need to do for that research. This is truly unacceptable and is a BIG step backward in our mission to become more research intensive."

Professor, College of Liberal Arts

Remedies

Fundraising

- Initiated fundraising campaigns with University Advancement
- Submitted 7 grant applications to federal and private funders

Alternate Models of Resource Sharing

- Pursued alternative methods for procuring requested items, such as open access options and pay-per-view services

Participatory Decision-Making

- Initiated a campus-wide survey seeking input from faculty and students on most-needed research databases and journals
- Used the survey results to inform resource decisions for FY2018

What Comes Next?

Revenue Generation

Revenue generation is the best option going forward to ensure long-term sustainability of the University Libraries and their integral, unique programs and resources. The Libraries at UMass Boston are some of the lowest-resourced of all UMass campuses and identified peers. One option for revenue generation is to propose to the Board of Trustees a fee that will support the ever-increasing costs of licensed intellectual property as well as IT infrastructure and utilities. The chart below shows possible models for this fee that could result in significant sustaining revenue for the University Libraries and IT.

STUDENT CT		Minimum Fee*		Income	Tier 2 Fee	Income
2016 HC	16,847		100	1,684,700	250	4,211,750
UG-G ITEMIZED FEE HC						
UG HC	12,847		100	1,284,700	250	3,211,750
GRAD HC	4,000		250	1,000,000	500	2,000,000
TOTAL HC ITEMIZED				2,284,700		5,211,750
2016 FTE	13,101		100	1,310,100	250	3,275,250
UG/G ITEMIZED FEE FTE						
UG FTE	10,280		100	1,028,000	250	2,570,000
GRAD FTE	2,821		250	2,338,100	500	1,410,500
TOTAL FTE ITEMIZED				3,366,100		3,980,500

University Libraries' Goals for 2017-2018

GOAL 1

Implement state-of-the-art library systems: *Alma*, a back-end library management system, and *Primo*, a next-generation search tool. This will be the Libraries' first major system upgrade in nearly 20 years and will provide the UMass Boston community with a single search box for library resources as well as smart search technology, enhanced relevancy ranking, and improved discoverability of the Libraries' unique resources.

GOAL 2

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 pathway partnerships between community colleges and UMass sister campuses to equip transfer students with the skills and resources they need to succeed at UMass Boston.

GOAL 3

Continue to develop and grow the unique primary sources in University Archives and Special Collections. These collections will give the University prominence and recognition for the wealth of materials that are one-of-a-kind and of high research value to faculty, students, and researchers around the globe. The Libraries will also continue to refine their archival instruction program to familiarize students with these unique resources and offer them a broader and more nuanced understanding of the information landscape available to them as students and beyond.

A Final Reflection...

This is the last annual report that, first as as Interim Director, then as Director, University Librarian, and Dean of University Libraries, I will author with my colleagues in the University Libraries. It is the goal of this new document and storytelling to give the reader insights into why Librarians have faculty status at UMass Boston and how their scholarship and work significantly contributes to the academic pursuits of the campus community. This report also integrates the metrics that are key for participation in the annual IPEDS and ACRL/ARL reports and that illustrate the story of how the Libraries at UMass Boston continue to be pivotal to so many users in an age in which so many other academic libraries have been challenged. UMass Boston Libraries have been a phenomenon among academic libraries in the United States due in part to their early adoption of electronic and digital collections, their implementation of library publishing, and their ongoing efforts to creatively and resourcefully offer the broadest possible range of information to their users with the fewest possible access restrictions.

In sum, over the last several years, the Libraries here have shifted from a traditional framework to one that is contemporary, flexible, and focused on the needs of its users. This includes the development of a strong electronic library, with noticeable growth in holdings and in high-quality services to support research and teaching from any location and at any time. This model includes the addition of Digital Commons to house UMass Boston-authored theses and dissertations, faculty publications and manuscripts, and large collections of campus materials, making the work of our scholars highly visible across the nation and the world. These collections include not only campus works published under the recently implemented open access policy; but also the development and maintenance of three global, digital libraries published by the University Libraries: the Digital Library of Mercedes Agullo y Cobo, the Digital Collection of President Leslie Manigat, and the Jean-Claude Fignole Collection. Analytics demonstrate a robust global readership for these open access collections. The school's global prominence is further reinforced by truly unique collections like the Massachusetts Memories Road show, which has become a national model for collecting and archiving community-based historical materials.

As in the past, the University Libraries look forward, anticipating the needs of the Libraries' users and of the UMass Boston community. 2018 will bring exciting technological transformations and innovative partnerships that will enhance efficiencies, experiences, and outcomes. I am proud to have steered the Libraries this far and eagerly anticipate watching their next steps--which will be both transformational and resourceful--from my new vantage point.

Daniel Ortiz-Zapata, July 2017