



University of Massachusetts Dartmouth and Ex Libris

The University of Massachusetts Dartmouth (UMass Dartmouth) is one of the campuses of the public, research-oriented University of Massachusetts System. UMass Dartmouth has 8 schools and colleges, including a School of Law, and a total enrollment of 9,000 students. The Carney Library has a staff of 30, with collections of 440,000 volumes, 62,000 e-journals, and 1,400 e-books. The UMass Dartmouth School of Law, with independent administrative structure, is also included in Alma. It has an enrollment of more than 200 student and a library staff of five. Previous ILS and other related systems: Ex Libris Voyager, SFX, MetaLib.

Moving to Alma

On January 17th 2013, the staff of the Claire T. Carney library greeted students, faculty and staff returning for the new spring semester with the opening of the newly renovated and transformed library and an equally transforming suite of services based on Alma and Primo cloud-based platforms. The UMass Dartmouth Chancellor had challenged the university community to prepare for the future through inspired innovative thinking and action. The Chancellor had stated that new thinking and actions were needed if the university were to move forward towards the goal of becoming a national doctoral research university and for it to meet the aspiration embodied in its slogan "World Class. Within Reach." A centerpiece of the university that reflected this call for change was the ongoing renovation and new addition to the library building that was to make it a cutting edge facility and a reinvigorated center of campus life. As the new library was being planned, the Library Systems & Digital Services division, as part of its

ongoing futures planning process, asked how the library could respond to the fundamental changes in the world of information discovery and delivery as experienced daily by its university community. As part of the process, the division reviewed general trends, the library systems marketplace, and new ideas and projects being taken on at other libraries and academic campuses. They were aware of developing technologies and trends, and were interested in particular in hosted services and the ability to collaborate with other libraries.

The staff of the Carney and Law libraries is relatively small. Voyager modules were separate and did not interact, making the division of work among different staff inefficient for small departments. Another priority was to improve the visibility of library resources, especially electronic resources, to end users. A new management platform combined with a discovery tool

Summary of Institutional Benefits:

- Alma is of great value to libraries with smaller staffs
- Alma promotes staff development, independence, and collaboration
- Integrated workflows allow for efficiencies and streamlined collection management
- Access to data enables improved service to users

would align with the library needs. UMass Dartmouth was already a satisfied Ex Libris customer, and preferred one vendor for both the back and front end systems. Rather than move to hosted services only for SFX and MetaLib as originally intended, they made the bold move of proposing that they become Alma Early Adopters. Alma aligned with the strategic vision of the libraries and the University, and the Dean of Library Services enthusiastically encouraged and supported this challenging proposal.



“Alma provides great value to libraries with smaller staff”

Susan Raidy-Klein, Collection Development & Acquisitions Librarian

The benefits that UMass Dartmouth sought in moving to Alma included: a unified system for management of resources, especially electronic resources; a cloud-based system to reduce maintenance and ongoing management of servers and clients—including upgrade preparation, downtime, re-creation of customizations, upgrading of PCs; and, a web-based system to allow for integrations with other services. Unified management meant the possibility of efficient workflows for their small staff. The promise of shared responsibility and collaboration through the Community Zone and the management of digital resources were attractive to them. Alma’s monthly release schedule emphasized that Alma is an evolving tool, improving over time. Agile development was considered a positive factor, allowing Alma to move forward faster and more responsively.

The vision and long-term goals for Alma aligned with UMass Dartmouth’s plans. UMass Dartmouth went live with Alma and Primo on the very day the renovated library building opened, making a clear statement about

their commitment to meeting their strategic priorities.

Impact and Value of Alma

High Value for Smaller Staffs

UMass Dartmouth has a small staff, and retirements and downsizing have imposed changes on the way staff need to work. Through its automated and role-based workflows Alma has become a vehicle for staff empowerment, integration, learning, communication, efficiency, and collaboration. According to Susan Raidy Klein, Collection Development & Acquisitions Librarian, “The smaller the staff, the greater the value of Alma.”

A library with fewer staff depends on individuals with flexible skills and a view of the entire workflow. Each position is more complex; staff cannot function in a silo performing only one piece of a process. UMass Dartmouth explains that in a one-person department, Alma lets staff multi-task across functionality. The ability to see the whole process in Alma promotes efficiency and helps staff as individuals to do their work, providing a sense of accomplishment.

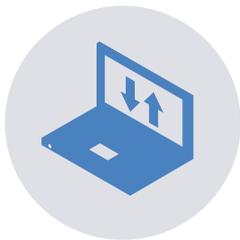
Integrated Workflows

For technical services staff, Alma’s integrated workflows save considerable time. Susanne Andrews, Serials & Electronic Resources Librarian, reports that daily updating of electronic titles takes half the time that it did previously. Integration has required learning about related functions in the lifecycle of library materials. Acquisitions and cataloging staff interact constantly, and everyone



has to know how all the parts work. The result is that individual staff members benefit from continuous learning and independence; they are better equipped to carry out a complete workflow without handing off to others for specific steps that were previously performed in a different module.

Enhanced Collaboration and System Management



UMass Dartmouth staff have been able to handle database maintenance projects by creating detailed sets and reports using Alma's advanced search. Multiple staff can create lists to work on various data cleanup activities, such as holdings, items, and reclassification. With spreadsheet outputs, the work can be completed or shared as needed with other units. Sets can be saved and run again. Alma's batch processes have improved record management and accuracy for functions that include: batch importing of MARC records (consortial e-books DDA project); batch location updates for a weeding project; and, changing locations due to the moving of materials during the library renovation project. Staff have learned to use normalization rules and merge rules to work efficiently with batches of records. These Alma features support self-service, independence, and collaboration.

According to Yueqing Chen, Alma System Administrator, "Alma doesn't reduce the work, it changes the work. It becomes more interesting and challenging."

Shared Access to Data

Collection development and public services staff also benefit from the ways in which Alma integrates functions and shares information. Subject liaison librarians are able to search Alma for needed information about the status of orders and circulation of materials. They receive Interested User notifications for faculty purchase requests, which allow them to support faculty with accurate and speedy responses about the receipt of new materials. These all reinforce good customer service and spread information and expertise throughout the staff. All library staff including the liaison librarians, have a customized Alma home page displaying a dashboard and widgets tailored to their interests and responsibilities.

Value to the University

According to Charlie McNeil, Chair of Library Systems & Digital Services, Alma and Primo together provide UMass Dartmouth with a unified system to manage and expose all library resources. Alma is providing the staff with the tools to support the strategic research and learning goals of the university, reinforcing the centrality of the libraries to the mission of the institution.