

University Libraries Five Year Review

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UMSL | Libraries



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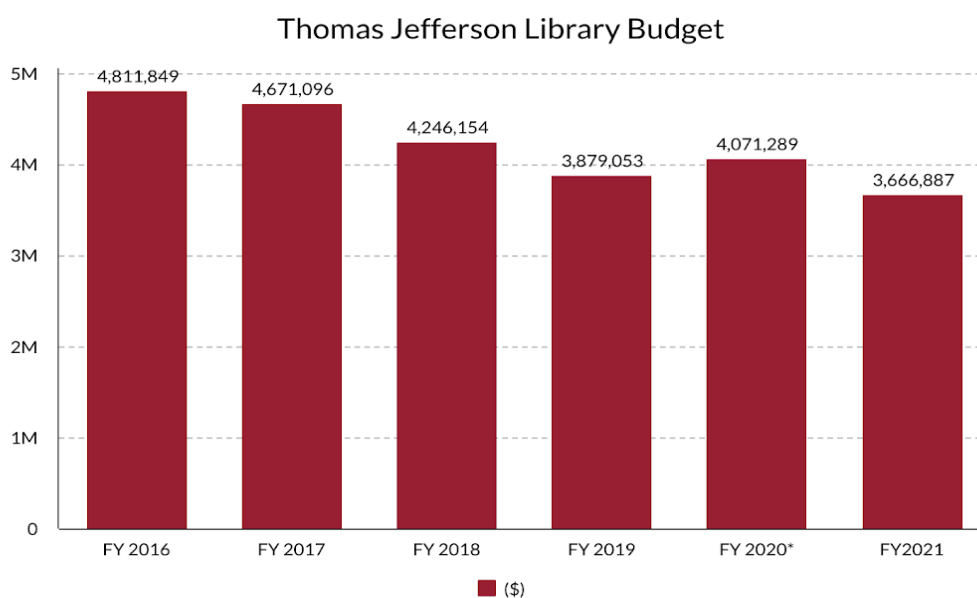
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Executive Summary

While much has changed since the last Five-Year Review of the Libraries of the University of Missouri-St. Louis, many issues and trends have remained the same. The recent pandemic crisis has required the Libraries and its staff to shift many of its activities to an online and remote model, something that was already incrementally occurring.

The continuing and precipitous decline in overall budget and staff size is no longer "unprecedented" as stated in the previous review but has become the status quo. Since the last review in 2015, the Thomas Jefferson Library has seen a greater decline in staff numbers. Since 2015, the library has lost 14 librarians and staff to have them replaced by 4 new hires and 3 internal promotions. The librarians and staff internally promoted were not replaced but rather took on additional duties. The current number of librarians and staff in the Thomas Jefferson Library is 19. By the end of 2020, the staff size will be 17 due to upcoming retirements. The administration remains concerned about maintaining our level of service as we continue to lose and not replace librarians and staff.

The Libraries continue to persevere despite significant annual budget cuts and the ongoing inflationary pressures on the order of 10 percent annually, or more, for acquiring new, and maintaining existing, resources. In 2016, the Libraries' budget was \$4,811,849 and has declined by 27% since then to a budget of \$3,666,887. We are currently working with faculty to eliminate \$600,000 in journals and electronic resources due to a recent budget deficit in the face of COVID-19. This budget decrease is not inclusive of the loss to our purchasing power. Each year journal and database costs increase more rapidly than normal inflation rates. These annual increases also chip away at the library's ability to expand resources and allocate for new, largely electronic needs. As we all continue to work and learn remotely, it is imperative that the library provide access to the resources needed by students and faculty.



*FY2020 did not have a budget cut due to Dean Dames extended leave for a medical emergency.

Budget numbers do not adequately reflect how the change from a carryover method with reserves to a zero-based budget has affected the library since the last report. This method allowed Acquisitions to make fewer, but larger cuts, by spreading reserved surplus funds forward into the following years. When the campus suddenly shifted to a zero-based budgeting system, these reserves were held in stasis for a few years. However, at the end of FY2020, nearly \$2.5 million in operating and acquisitions reserves were returned to the campus to offset campus COVID-19 costs. While necessary given the extenuating circumstances, these funds were originally designated for resources, services, and upgrades that were never realized.

The cost of print and electronic resources has continued to increase more rapidly than other costs, with serials inflating at an average rate of 5.5% in recent years according to vendor analysis. Although the COVID-19 crisis prompted many publishers to reduce or eliminate increases for 2021, this trend is expected to continue eroding the library's purchasing power. Between budget reductions and rising costs, the library is struggling to provide the resources and services needed to support education and research efforts on campus.

Overall success is still measured by the extent that resources acquired by the libraries match what patrons are seeking, and how quickly and easily patrons can acquire what they want. Our success is also measured in our ability to collegially assist all our users. In order to continually improve this role, assessing the use of services, collections and resources is a continuous process.

Additionally, as the number of staff has declined, assessment of how, how many, and what type of information transactions take place continues to be relevant for deploying the declining number of professional staff. A single Public Service Desk (PSD) was planned for and implemented in 2016. The PSD consolidated both reference and circulation activities. The PSD was the primary service outlet in the Libraries until restrictions to in-person interactions and transactions caused by the COVID-19 pandemic brought about a rapid shift to delivering resources and services almost exclusively online. The recently hired Associate Dean of Libraries, Jaleh Fazelian, instituted a new system, the Springshare Suite, to aid librarians with their work. The new chat, scheduling, statistics, and tutorial system has allowed librarians and library staff to have more interactions with library users and to track those interactions for follow-up and assessment. The ability of the Thomas Jefferson Library to make the transition to almost exclusively online services took place, literally, within weeks. Online reference interactions, primarily via chat service, continue to increase as users continue to need assistance while away from campus.

The libraries continue to develop and refine services to assist our student population. This is done by developing and monitoring a robust web presence which delivers information about, and access to, most library resources. Based on ongoing analysis of user demand for databases, online periodicals, and electronic books, the libraries aim to increase the acquisition of, and access to, print and online materials.

Formal and informal assessment aids the libraries in changing and improving services to the University community. This review will underscore the libraries ongoing activities in formal assessment of its services, primarily in the area of library instruction. This type of assessment was identified as an area of need in the last decade and continues to be considered an ongoing and necessary process.

The St. Louis Mercantile Library has now been affiliated with the University since 1998. The Mercantile's presence on campus has become even more integrated and involved in the library and University missions and goals over the last five years. A separate section of this review has been prepared to specifically highlight the St. Louis Mercantile Library's unique role at the University. This review will indicate how the Mercantile's outreach and community activities more fully round out the contribution and support to the broader University Mission.

Table of Contents

<u>Section</u>	<u>Page</u>
• Overview	5
• Library Units	6
• Mission and Vision	10
• Processes and Performance	17
• Assessment	22
○ Quantitative Assessment	22
○ Qualitative Assessment	23
• Goals Accomplished Since Last Review	25
• Goals for the Next Five Years	25
• Mercantile Library	26
• Appendices	
○ Appendix A: University Libraries Organizational Chart	
○ Appendix B: Library Campus Review Team Report, 2015	
○ Appendix C: Library External Review Report, 2015	
○ Appendix D: Library Instruction Assessment & Survey Report, 2017	
○ Appendix E: Renovation Taskforce Report, 2018	
○ Appendix F: SpringShare Chat Ratings and Comments, 2020	
○ Appendix G: Mercantile Library Imprints, Exhibits, Tour Statistics	
○ Appendix H: Library Collaboration Report, 2020	
○ Appendix I: Access Services Annual Report, 2020 (Parts I & II)	
○ Appendix J: Collections and Acquisition Annual Report, 2020	
○ Appendix K: Reference Department Annual Report, 2020 (Parts I & II)	
○ Appendix L: Technical Services Annual Report, 2020	

Overview

The University of Missouri-St. Louis Libraries are led by Dean Christopher Dames. Dean Dames has held this position since 2008, giving the libraries consistent leadership for over a decade. He is aided by John Hoover, the Executive Director of the St. Louis Mercantile Library; Jaleh Fazelian, Associate Dean of the Thomas Jefferson Library; and Elizabeth Richter, Business Administrator for the libraries.

The libraries of the University of Missouri-St. Louis (UMSL) consist of the Thomas Jefferson Library and the St. Louis Mercantile Library. The Thomas Jefferson Library and St. Louis Mercantile Library are housed in the same location but their relationship is governed by an affiliation agreement. The two libraries are complimentary counterparts but are budgetarily separate.

Offsite storage at the ITE Annex on Natural Bridge Road was utilized from 2015-2020. The storage facility was sold by the University in 2020 and all materials were transferred to The Thomas Jefferson Library in the summer and fall of 2020. A portion of the second floor of the Thomas Jefferson Library was transformed from static shelving to moveable shelving to allow for the materials to return.

The Library was one of the first buildings on campus, opening in 1968. A new wing was added in 1990 which doubled the previously available space. The building currently houses the Administrative Offices, University Archives, and the St. Louis Mercantile Library. Reference Services, Access Services, Technical Services, Collection Development, and Acquisitions and Serials Departments are also housed in the Thomas Jefferson Library building. The State Historical Society of Missouri Research Center-St. Louis (SHSRC, formerly the Western Historical Manuscript Collection) is also located in the Thomas Jefferson Library. The State Historical Society of Missouri branch in the Thomas Jefferson Library is its own entity and does not report directly to anyone in the libraries, though they work with the Thomas Jefferson Library on issues related to building maintenance and access.

The St. Louis Mercantile Library, originally founded in 1846, administers the rare book collection that is housed in a secure and climate-controlled vault, and a reading room for utilizing the materials. The St. Louis Mercantile Library continues to present and curate its own exhibits and programs. Of special note was the acquisition of two leaves of the Gutenberg Bible (42-line Bible) and the subsequent hosting of an exhibit of the new acquisition as well as pages of the Bible held by various Missouri Universities.

Library Units

Thomas Jefferson Library

The Thomas Jefferson Library consists of three main units: public services, technical services, and acquisitions. The day-to-day management and oversight of the Thomas Jefferson Library is led by the Associate Dean. A search for a new Associate Dean began in early 2019, replacing the Associate Dean who retired in 2017. The new Associate Dean serves as an advocate for and promotes the needs of the Thomas Jefferson Library. This position is charged with executing a vision to further the mission of the Library and fostering an organizational climate based on respect, service, and teamwork, in which diversity, communication, and innovation thrive. The position was filled by Jaleh Fazelian in September 2019.

Public Services

The Public Services Department of the Thomas Jefferson Library is headed by Lindsay Schmitz. Ms. Schmitz oversees the work of Access Services, which includes library IT, circulation, shelving, interlibrary loan, and MERLIN/MOBIUS. MERLIN is a consortial partnership with the UM System Libraries to share library materials, services, and information. MOBIUS is a similar consortium that serves libraries across the state of Missouri. This unit facilitates the use of the Libraries' print collections by UMSL faculty, staff, and students, as well as loaning material to other libraries through consortial agreements. Access Services is also responsible for shelving and reshelving material, maintaining the general stacks, and billing for overdue library materials. Public Services also includes the Reference Department, though they are a separate unit from Access Services. Although these units are separate, they often work together to provide online and in-person reference services. The full-time staff members that make up the Access Services Department are classified as University support staff and the librarians in the Reference Department are classified as non-tenure track faculty. Librarians are required to have an American Library Association accredited Master's degree.

Access Services currently has three staff members. The unit lost two staff members in 2019-2020 due to retirement. The Thomas Jefferson Library wrote a justification for a new Access Services Librarian to replace the two vacant staff positions. The Access Services Librarian would be a professional position with duties in both the Access Services and Reference Departments. This new position was approved until the COVID-19 budget implications created a hiring freeze. The library hopes, for several reasons, to have this position available again when there is no longer a hiring freeze. With a degreed librarian in this position, we will have someone who can come into the job and immediately perform the majority of the duties in Access Services as a result of coursework or relevant experience. This librarian may also have ideas for transforming policies, unit workflows, and consortia sharing. This experience and coursework will also allow the Access Services Librarian to contribute to ongoing professional activities in the Library such as collection development, research assistance, and library instruction. Having a librarian with responsibilities in both the Reference and Access services Departments would enable a unique perspective to contribute to projects and strategic planning.

Reference and Access Services have gone through many changes in the past five years. One of the most significant changes was the move from multiple service points to a single service desk. The library made the decision to move to a single service desk after extensive research that involved a student survey, interviewing librarians at other institutions with single service points, and reviewing professional literature. Access and Reference Services staff and librarians jointly staff the Public Service Desk to provide assistance to the UMSL community. This change is consistent with trends in academic libraries

across the country. Moving to a single service desk allowed for cross training and integration of the two units which has allowed us to more efficiently assist the UMSL community with their library and research needs.

The Reference Services Department currently has one unit head, five full-time librarians, and one librarian who is shared with the University of Missouri's School of Information Science and Learning Technologies. The shared librarian will retire in January and will not be replaced on our campus. The Reference Department is responsible for facilitating the research needs of UMSL faculty, students, and staff. Research assistance is provided via scheduled research consultations, in-person assistance at the Public Service Desk, and email and chat interactions. As a result of the COVID-19 pandemic, the Reference Department had to abruptly pivot to online reference assistance which is provided through chat and Zoom interactions. The Reference Department also offers library instruction, focusing on information literacy and research tips, to UMSL classes. The Library Instruction Program is coordinated by librarian, Chris Niemeyer. Under COVID-19 restrictions, all library instruction is currently provided via Zoom.

In an effort to provide individualized research assistance to First Year Experience students, the Reference Department began a pilot Personal Librarian Program in the Fall 2020 semester. This program pairs FYE students with a librarian who students can contact with questions about research and finding resources for their research papers and class projects. This project idea came from brown bag discussions hosted by the Associate Dean for the librarians to discuss new ideas and programs that might invigorate the library. The program is being led by librarian, Lindsey Scales.

The Reference Department has undergone several changes under the auspices of the new Associate Dean in conjunction with the Head of Public Services. After discussion and investigation, the Thomas Jefferson Library subscribed to the Springshare Suite, a group of software products that assist librarians in providing online content and services and tracking statistical information to use in assessment. This implementation included revamping our library research guides, moving from LibraryH3lp as our chat client to LibAnswers, and pulling together most library statistics into LibInsight. Librarians and Access Services staff also worked together to generate a new form for gathering statistics that track all of the ways the library assists patrons.

Acquisitions

The library's Acquisitions Department is led by Timothy Nelson. Tim also has duties related to traditional librarian work. He and his staff oversee the acquisition of all library materials, both print and electronic.

The Acquisitions Department is staffed by four employees (including Tim), two librarians and two staff members. Since 2016, the department has lost one librarian position that was not replaced. The department expects a staff member to retire in the near future and they will likely not be replaced.

In addition to the typical acquisitions duties, the department also leads library weeding projects, handles the receipt of gift materials, works with the Technical Services department on the quality control of the catalog, ensures electronic items are loaded, and gathers data needed for budget decisions such as system and local purchases or, in recent times, large scale budget cuts.

The department also manages the proxy server configuration, which allows for users to login with their UMSL credentials to access electronic holdings from anywhere in the world. They also oversee the library's website. Tim Nelson worked closely with Lindsay Schmitz and Jaleh Fazelian on the training and implementation of the Springshare Suite.

The library has dealt with budget cuts in FY2018 and FY2021. The acquisitions department worked with librarians to share data and gather feedback from faculty about what items the library should cut from their collections. This work is often complicated due to contractual agreements, items purchased as packages, and user demands for content needed to perform their research.

The librarians in the acquisitions department act as subject librarians, work at the public service desk, and monitor online chat shifts, in addition to their acquisitions duties. They also work with the UM System on the MERLIN Collection Development & Reference Services Committee (MCDRSC) to make decisions about purchases and cuts for items that are accessible to the entire UM System.

Technical Services

The library's Technical Services Department is led by David Owens. He and his staff oversee the cataloging of print and electronic materials for the Thomas Jefferson and the St. Louis Mercantile Libraries.

The Technical Services Department is staffed by two librarians and two staff members. The librarians are split in their duties, one reporting to the Thomas Jefferson Library and the other reporting to the St. Louis Mercantile Library. These librarians complete tasks associated with creating and maintaining original cataloging. The unit also performs copy cataloging, which utilizes records created by other libraries in our catalog or OCLC/Worldcat. OCLC/Worldcat is an international database of catalog records and holdings. Our library participates in OCLC by adding our holdings to the database. The unit also catalogs and makes available electronic materials in the form of databases, ebooks, and electronic theses and dissertations. The unit will lose one staff member to retirement in December 2020.

The unit also oversees the work of authority control. Authority control is how we organize and describe authors and other creative entities in a uniform matter. There are often updates related to birth and death dates, and more. This is time intensive work and it is necessary to have a useful catalog. The unit also works to ensure that our holdings are accurate in OCLC/Worldcat.

Technical Services works with Acquisitions to ensure that the catalog and Summon discovery tool are accurate.

The unit also collaborates with other UM System libraries through the MQCC (MERLIN Quality Cataloging Committee) to establish and implement cataloging procedures across the campuses and to share authority control reports. The unit works with the Library Support Office (LSO) in Columbia to upload, overlay, and update catalog records. These collaborative activities allow for greater efficiency and low costs.

University Archives

The University Archives is currently under the purview of Charles Brown, a librarian in the St. Louis Mercantile Library. Charles took on these extra duties when the last archivist left the university in 2017. The University will need to provide salary funds for a new archivist when Charles departs as he is funded by the St. Louis Mercantile Library donors and his primary responsibility is to manage their reference department. He was able to take on these additional duties due to his mastery of their large collections. However, his successor will likely be overwhelmed if given both responsibilities.

The mission of the University Archives is to preserve and make accessible those items of enduring historical, operational, and legal value to the University.

The Archives of the University of Missouri-St. Louis is the repository of official records of the University. These include administrative, faculty, staff and student life records. University Archives began collecting the documents and records of the St. Louis campus in 1969. From 1969-1977 the Archivist reported to the Vice Chancellor of Academic Affairs. In 1977, the Archives was placed under the direction of the University Archivist in Central Administration. In 1991, University Archives was decentralized and placed under the Director of Libraries on the St. Louis Campus.

Current access to the University Archives can be found in the secure confines of the Rare Book Reading Room of the St. Louis Mercantile Library located on Level 2 of the Thomas Jefferson Library Building. There, the University Archivist receives documents and records from various UMSL departments, processes them for storage, and presents the material and other assistance to researchers through in-house visitations, phone and email service. The UMSL Archivist is responsible for representing the campus in regularly scheduled sessions of the *University of Missouri Records Managers and Archivists*.

Exhibits and Collections

University Exhibits and Collections is under the purview of Julie Dunn-Morton. This position was previously held by a tenured faculty member. Julie, the St. Louis Mercantile Library's Curator of Art, performs these extra duties with the assistance of two graduate students.

The University Exhibits & Collections Department is responsible for the care and display of nearly two thousand works of art that are exhibited in offices, lobbies, conference rooms, and hallways throughout the UMSL campus. The collection contains works by noted American, St. Louis, and international artists, which, through their prominent placement in nearly every UMSL building, provide an exceptional and diverse cultural experience for all UMSL students, faculty, staff, and campus visitors. The Department employs graduate students from the UMSL Museum Studies program and in the past five years has provide training to three students in collections database software, best museum practice in object handling, storage, and display, and professional interpersonal skills as they learned to work with staff and faculty for the process of loaning and returning artwork.

In the past five years the part-time Department Coordinator and graduate student oversaw the loan of two paintings to a major retrospective exhibition, the conservation of four paintings, and the loan or return of over 150 works of art. Students maintained the collections database that is updated for every loan and return, as well as for the biennial campus-wide inventory. During the past five years one student also created a temporary case exhibition in the Thomas Jefferson Library of African sculpture from the collection, which provided hands-on training in the curatorial practices of object research, exhibition design, label writing, and installation. This exhibition received many favorable comments from students using the Library. These activities accomplish the Department's goals of enhancing the campus environment with culturally diverse and aesthetically engaging artwork while contributing to the training of new generations of dedicated museum curators.

Mission and Vision

Library Mission Statement

Inspire, Connect, Transform

The Thomas Jefferson Library inspires student success by creating a community of learners in an urban, academic library. We connect students to resources they need to contribute to an information literate community. We transform the community through the dissemination of knowledge and information that encourages engaging the world through diversity and inclusion.

The libraries see themselves as a vital part of the campus infrastructure, enabling the entire campus community to fulfill their goals and missions. This is done by:

- acquiring relevant and needed materials to fulfill the institutional mission,
- organizing available resources to ensure accurate and easy access,
- preserving ongoing access to all relevant resources (physical and online), and
- assisting and instructing patrons in identifying, acquiring, and using resources.

Library Vision

The Thomas Jefferson Library supports the scholarly needs of the university through teaching, collections, and partnerships that build upon campus, state, and regional relationships.

The library envisions being able to continue to efficiently serve the campus community in the face of declining resources. In order to achieve this vision, consolidation of services and cross training of staff continues to be a primary focus. By implementing a single service desk, employees can deliver all services from a single location near the current Thomas Jefferson Library entrance.

The move to a single service point is consistent with trends in academic libraries across the country. This single point of service allows for fewer librarians on the desk at once and frees up their time to work on other duties, such as creating research guides, tutorials, or having one-on-one research consultations. At least one librarian was on call during most hours when the desk was not being staffed. A chat service was deployed in 2014 and was replaced in 2020 with the Springshare Chat feature.

With the recent implementation of the Springshare Suite of online library tools, staff scheduling, patron appointments, communication, patron chat, statistical tracking, FAQ production, and user documentation and guides (LibGuides) are all utilized and maintained seamlessly.

The librarians now offer online classroom instruction, as well as the popular research consultation program by using Zoom teleconferencing software. The research consultation program allows faculty, staff, and students to request assistance by email, or by setting up an online Zoom appointment.

Support for University Mission

We transform lives: As the metropolitan, land-grant, research institution serving the most diverse and economically important region in Missouri, the University of Missouri–St. Louis delivers exceptional educational, research and engagement experiences that inform, prepare, challenge and inspire.

The University Libraries contribute directly in providing “exceptional educational, research, and engagement experiences” for our diverse student body. We provide resources for the innovative research of our faculty. The combined services of the Thomas Jefferson and St. Louis Mercantile Libraries provide resources, assistance, and services that are an integral part of the campus academic infrastructure.

Support for 2018-2023 Strategic Plan

*UMSL’s fundamental purpose is to educate and graduate diverse students as they seek different and better lives. This compact commits UMSL to offering qualified students **access** to quality academic programs, support services and other resources that prepare them for **success** in the classroom and beyond as they become leaders of our economy and communities.*

*As the only public research university in eastern Missouri, UMSL has a responsibility to initiate and support **innovative** research, scholarship and creative works that enhance educational **success** and economic activities as well as lead to a better understanding of the human condition. . . .*

As one of the most culturally and ethnically diverse campuses in Missouri, UMSL is committed to maintaining a climate where all students, faculty, staff and visitors can explore their interests, refine their talents and flourish. . . .

Areas Of Focus

- *Access to quality support Services*
- *Support innovative research, scholarship, and creative works*
- *Maintain a climate for refining talents*

The libraries continue to acquire and administer the information resources required by a modern university. Since the last Five-Year Review, the libraries have increased the number of online periodicals available to researchers and have added more electronic books. However, any gains made in the previous five years, especially as related to online periodicals, will be offset by the upcoming UM System and Thomas Jefferson Library cuts. Packages from Elsevier, and Wiley will not be renewed in FY2021 and many individual subscriptions will be canceled. All online resources are included and integrated into the library’s discovery service, Summon, so that users can access online journals and books.

Although some figures reflect increases in the library's collections since the last five-year review, this was mainly due to the addition of subscription and open access resources (both ebooks and journals). However, the library did expand its ebook collections. In anticipation of reduced shelving space on the main floor, a Gale reference ebook collection (1,214 volumes) was purchased. During 2018 and 2019, a

dozen Springer ebook collections (5,550 titles) were purchased as an experiment, but due to cost and limited selection, the library decided not to purchase future Springer ebook collections. Given the IPEDS data changes, relentless inflation in the cost of serials & books, and acquisitions budget reductions in 2018 and 2021, the library's purchasing power has significantly decreased since the last report. While the library attempts to support all university programs, it has been increasingly difficult to do so.

With upcoming budget cuts to the University of Missouri system and to the shared pool of funds all four system libraries use to support research, in addition to budget cuts at UMSL, the library's electronic offerings will be greatly reduced in the coming school year and beyond. We cannot currently quantify this other than to say the library has a \$600,000 cut to the materials budget, about 24% of our annual budget. This cut comes after a 2018 cut of \$650,000. We have been working with departments to gather input for what items are needed for research, teaching, and accreditation purposes.

The Libraries are members of a statewide library consortium, MOBIUS. As MOBIUS members we share access to print materials, electronic resources and databases, and an integrated library system. Additionally, we occasionally take part in consortial pricing for materials via MOBIUS. We also work with them on Affordable and Open Educational Resources initiatives.

With the continued use of the OCLC interlibrary loan software, Tipasa, patrons can make requests from databases for items not owned by the libraries with a single click of a mouse. Average turnaround time for articles is 48 hours. All articles are digitized and delivered online. In 2014 the MOBIUS Consortium announced a library material sharing agreement with the Prospector Consortium. UMSL library patrons can now access more than 30 million new items from libraries in Colorado and Wyoming. Turnaround time for MOBIUS items generally is 3-5 business days. Due to new COVID-19 restrictions for quarantining materials the current turnaround time is about 7-10 business days. We continually analyze how online resources are being used, and how to better utilize them in order to directly enhance the quality and efficiency of all researchers.

[Access to quality support Services](#)

The resources and services available to the UMSL community should be considered an essential element in the University. Data consistently indicates that use of online resources being acquired by the libraries is increasing. The libraries continue to maintain its facilities, including hosting the most heavily used computer lab on the campus, the continually evolving Library Research Commons.

A coffee shop, Café TJ, was opened in the Library in 2013. In the fall of 2019, the Thomas Jefferson Library worked with campus entities to expand the hours of Café TJ due to demand.

Library services are designed to assist all patrons in the research experience. Library instruction reaches a sizable percentage of the student body, and any individual student, faculty, or staff member can request an appointment for personal assistance, both in person or online.

[Personal Librarian Program](#)

In the Fall of 2020, Thomas Jefferson librarians collaborated with the Coordinators of the First-Year Experience (FYE) Program to offer a service called the Personal Librarian Program. This service is geared toward new/first-time students. The Personal Librarians seek to ensure that students new to UMSL are aware of library resources, services, and programs, offer research and assignment support to first-year students, and decrease student anxiety when it comes to library use. The librarians meet these goals by meeting with students online to help them navigate TJ Library databases, locate other information sources at the library and beyond, help students develop research topics, and connect them to other

campus resources. The program is designed to save students time and help them succeed academically during their crucial first year in college. We are currently collecting data to assess the utility of this new program.

Springshare Suite

In the Fall 2019 semester, the Associate Dean worked with the Head of Public Services and the Head of Collections to create a justification for the purchase of the Springshare Suite. The library was already utilizing [LibGuides](#), a Springshare product to create research guides. The Associate Dean was looking for a system that would allow the library to streamline its processes and bring together outward facing tools like research guides, tutorial, FAQs, and room/technology reservation with inward facing tools like assessment, calendars, and internal FAQs.

For a number of years, the library was using multiple disparate products that did not talk to each other to handle some of the aspects listed above. As the number of library staff decreases, the Associate Dean wanted to create a one-stop shop that was easily accessible to all library staff but also encourage the use of tools already in use by the university.

Staff training was held in May and June to allow staff several weeks to set up and become accustomed to the system. Step-by-step instructions were shared prior to each training session and also made available in the library's all staff files in Teams.

Springshare works with Outlook to create a seamless calendar system. Springshare reads the users linked Outlook calendar. In the [LibCal](#) portion of Springshare, the UMSL community can see the availability of any librarian and make an appointment that fits their schedule. Additionally, this module allows the library to create event calendars and event registration for library hosted events.

LibCal also has modules for reserving spaces and technology. The library was able to utilize LibCal in the summer of 2020 to set up curbside pick-up during the COVID-19 closure of campus. This allowed us to provide print materials to the UMSL community. While we have set up study room and laptop reservations, we have not been able to utilize them due to COVID-19 restrictions.

In the LibStaffer portion of Springshare, units have set up internal calendars for on-call, chat, mold cleaning, and desk shifts. When a shift is assigned it automatically appears in the users Outlook calendar.

In terms of assessment, the library has implemented LibInsights. This is where the library gathers data on group and one-on-one instruction, chat, email, and desk interactions, gate count, Personal Librarian interactions, cataloging statistics, journal usage statistics, and database statistics.

Librarians are working as a group to implement LibWizard to create tutorials for the UMSL community. A small group of librarians are leading the Tutorials Group to create [guidelines](#) for all librarians wishing to make tutorials.

Most of the web content has been moved into LibGuides for easier maintenance, faster updates, and a more uniform appearance. In the coming year, forms and the Reference email account will be reworked and integrated more tightly with the overall Springshare modules to improve patron and staff workflows.

The change that has gotten the most use has been the transition from the chat service LibraryH3lp to [LibAnswers](#). Librarians and Access Services staff work together to answer questions that come in via the chat interface. They have also worked to create an FAQ for the campus. When chat is offline, users are directed to the FAQ for answers and they can also leave a ticket to a librarian to follow up. Since March

2020 this has been one of main ways the UMSL community has received assistance from the library. Assessment is inherent in the new chat system. When a chat session ends, library staff are presented with a form to input about the interaction. Additionally, UMSL community users are also given a chance to give feedback on the interaction.

Support innovative research, scholarship, and creative works

Affordable and Open Educational Resources

In 2020 the Thomas Jefferson Library assumed duties for the campus' commitment to Affordable and Open Resources (A&OER). The effort is co-coordinated by Jaleh Fazelian, Associate Dean and Lindsay Schmitz, Head of Public Services. They are assisted in their work by librarians Helena Marvin and Judy Schmitt and Graduate Student Danielle King. Marvin and Schmitt lead workshops, assist with faculty A&OER publications, and work to highlight A&OER works that faculty can use in their own course. Our graduate student works on the A&OER initiative by creating and maintaining the website, answering questions, and reaching out to faculty interested in implementing A&OER in their classes.

Additionally, we all work with Dr. Kim Baldus in the Honors College, who leads the Faculty A&OER committee. This committee meets about 3 times a semester.

In the fall of 2020, Fazelian and Schmitz agreed to co-chair the statewide A&OER Symposium slated for March 2021.

UMSL Common Read Program

The Common Read program is an annual, campus-wide reading initiative, hosted by the College of Arts and Sciences. The program's goals are:

- to spark wide-ranging conversation about diversity and inclusion in our community
- to provide a shared intellectual experience that connects, students, faculty, and staff

UMSL Libraries began supporting the Common Read Program in the Summer of 2019. The libraries support the Common Read Program through the commitment of library staff participation on the Common Read Planning Committee, hosting of the UMSL [Common Read LibGuide](#), designing and showcasing library exhibits of the selected work and author, marketing with flyers and social media advertisements, and outreach to other libraries in the UMSL community and Greater St. Louis region. For the 2019-2020 Academic Year, UMSL Libraries designed a library exhibit to showcase several works of James Baldwin from the Mercantile Library. This included the Common Read selection, *If Beale Street Could Talk*. The library also created the Common Read LibGuide and assisted with marketing UMSL Common Read events. For the 2020-2021 Academic Year, the Common Read Program is operating on a smaller scale and the library continues to participate on the Common Read Planning Committee and contributes to the Common Read Canvas site.

Institutional Repository

The Institutional Repository Library (IRL) brings together UMSL research and historical documents under one umbrella. We collect and preserve scholarly works created by members of the UMSL community and enable discovery and access to those publications. This activity is a high priority library initiative and has a dedicated librarian who oversees the maintenance of the IRL, as well as performing faculty and campus outreach, with a focus on developing a critical mass of content, including full-text documents, datasets, multimedia resources, and faculty profiles. The UMSL Institutional Repository Library launched as a service of the University of Missouri-St. Louis libraries on March 1st, 2016.

Faculty Services & Profiles

As of September 30th, 2020, there are 482 UMSL faculty profiles on the SelectedWorks platform. 13,654 works are showcased, of which 1,744 can be downloaded. Most but not all of these works are open access articles, some are gray literature (presentations and other works faculty choose to showcase). The downloadable works have been downloaded a total of 76,875 times as of September 30th, 2020 from faculty profiles.

Each year UMSL faculty members submit a list of publications to the University using the MyVita platform, tenured and tenure track faculty member's profiles are published on <https://scholars.umsystem.edu/>. The resulting list of works is harvested and each publication's copyright status is checked to ascertain if the publisher allows a version of the publication to be included in an open access repository. All works are shared as metadata works (citation level access) on the IRL maintained SelectedWorks faculty profiles, and open access works are featured as downloads. In addition to tenured and tenure track faculty, the library also creates profiles for teaching faculty whose works are added and investigated without aid from the MyVita dataset. Faculty members receive monthly usage statistics of their works via email.

IRL Collections

Open Educational Resources Collection

There are 24 Open Educational Resources showcased as works used by faculty teaching UMSL classes. Of these works, five were part of our Library-as-Publisher initiative. The collection has had 22,450 downloads, of those downloads 20,303 were of the Library-as-Publisher works. In addition to static PDF materials, this collection also includes videos, which have been streamed to completion 110 times.

Graduate Works: Electronic Thesis and Dissertations

The IRL took over responsibilities for hosting student theses and dissertations from UMSL IT in January of 2017. The works are approved by the UMSL Graduate School. The corresponding metadata is processed by the UMSL Libraries Technical Services department for inclusion in the library catalog. Graduate students are given the opportunity to highlight if their thesis or dissertation relates to themes of diversity, these works are showcased. As of September 30th, 2020, there are a total of 1349 graduate works shared in IRL, of which 222 are a part of the Diversity showcase. The graduate collection has had 188,371 full-text downloads between March 1st, 2016, and September 30th, 2020.

Undergraduate Works: UMSL's Undergraduate Research Symposium (URS)

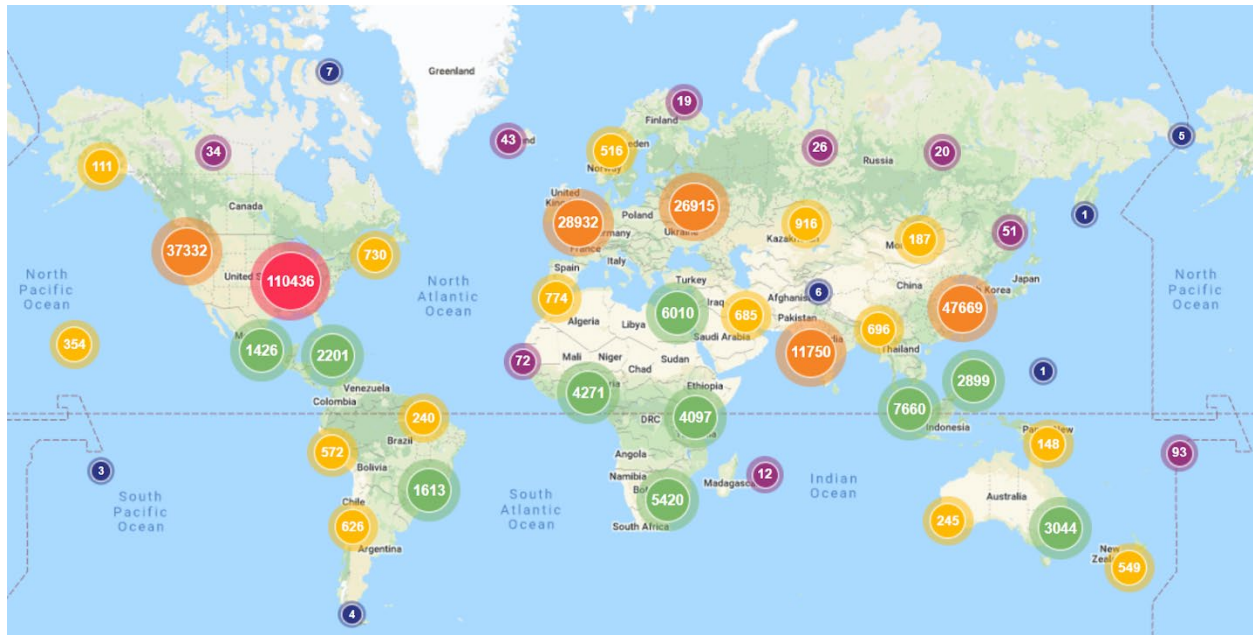
The IRL was integrated into the URS's submission process in 2019 and was instrumental in hosting the virtual URS in 2020. The 2019 collection is available on IRL and includes 25 works, which have been downloaded 1,744 times.

Other Campus Publications featured in the IRL include:

- Yearbooks
- Bulletins
- Salary Reports
- The Current, the student newspaper
- UMSL Library Publications
- UMSL Global Occasional Papers - formerly the Center for International Studies

- Faculty Departmental Collections
- Graduate Departmental Collections

From March 1st, 2016 to September 30th, 2020 there have been 16,237 works posted in IRL, which have been downloaded 347,776 times from 10,600 Institutions and 209 Countries.



Maintain a climate for refining talents

Academic excellence is enhanced by the libraries in three ways: first, by acquiring the necessary information resources required by researchers; second by assisting in the use of these materials, both through direct assistance by librarians, and by using a robust instruction program; third, by creating and maintaining a welcoming environment. This environment has come to include both physical structures as well as an online presence.

Additionally, we encourage our interested student workers to become part of our profession by supporting their desire to apply to library school, either at the University of Missouri-Columbia or at any accredited institution. As the Mizzou program is fully online, we work with our students who live locally to keep them employed through their graduate work. For these students, we aim to give them special projects so they may learn the depth and breadth of librarianship. We currently have two student workers, one in Technical Services and one in Access Services who are enrolled in Mizzou's SISLT program. The library has worked with many practicum students from Mizzou's SISLT program and other universities that offer Library and Information Science Master's degrees. Practicum students work in all departments of the library and have contributed to many special projects. For example, we have had practicum students create research guides, assist students with research through research consultations and library instruction sessions, and contribute to building UMSL faculty profiles in the Institutional Repository Library. Since COVID restrictions started last spring, the Library has hosted 14 online practicum students who work remotely to expand the Institutional Repository Library.

Processes and Performance

The libraries utilize an array of formal and informal mechanisms for communicating within the organization. Each library unit uses the same methods in order to communicate with other departments, and the library organization as a whole. The libraries developed and use standard employee evaluation tools in order to equitably evaluate individual performance. Finally, departments submit annual reports regarding overall performance of the unit (primarily quantitative measures) which are compiled into the overall library annual report. This information is utilized by administrators and employees in order to more efficiently administer and allocate library resources, including human resources.

Internal Library Communications

Inter-departmental communication is a necessary component for the smooth and efficient administration of an organization as complex as the university libraries. Face to face discussion, email, and telephone conversations are used informally to engage in dialog. Additionally, formal monthly meetings are held by each library unit in order to promulgate changes, discuss policy, or solicit input in order to reach decisions by consensus. Minutes of the individual departmental meetings are disseminated via library-wide email lists so that all departments are formally privy to the activities of all other departments. As the libraries have implemented Microsoft Teams, many units have been placing their notes in Teams for greater accessibility.

The implementation of the Springshare suite of library software with Microsoft Teams has integrated and allows tracking of all library communications. This includes access to common files, the configuration of groups and departments, and an archive of activity. Additionally, many library units are using chat functions in Springshare and Teams to cut down on emails and phone calls.

The Library Management Council consists of the heads of each department who meet, as a group, with the Dean of Libraries on a monthly basis. The minutes of these meetings are also disseminated via library-wide list. An example of how this works can be seen in the process for considering the purchase of an online database. First, an informal proposal for purchasing a database is presented. Such informal proposals can, and do, come from any librarian. This results in broad ranging informal discussions and investigations by staff. Considerations discussed would include the cost of the database, whether existing databases cover the same publications and discipline, and the potential use of the database by UMSL researchers. Subsequently, during one or more formal departmental meetings, the proposed purchase is discussed and a consensual decision on whether to purchase the database is made. The discussion and decision, in the form of the departmental meetings' minutes, are then distributed to all library personnel. Additional input from other individuals and departments is welcomed and may result in reconsideration of a decision. The impact of the purchase (e.g., the need to catalog new online publications) is immediately communicated to affected library units. This formal committee structure ensures that all relevant decision making involves the professional skills of as many individuals as possible. Information and input are communicated both up and down the administrative structure of the libraries using the monthly meetings of each department, as well as the monthly Library Management Committee meetings of department heads. The decision-making process is collaborative and transparent amongst the librarians and staff who perform the daily work of the organization.

Internal Meetings

Much of the library's communication is done in regularly scheduled meetings.

The Dean regularly gathers the Associate Dean, the Executive Director of the Mercantile Library, and the Business Administrator together for meetings to discuss issues in the libraries. Additionally, the Dean hosts monthly budget meetings with the library's Budget Officer, Mark Feters. The Head of Collections also sits in on the monthly budget meetings.

The Associate Dean holds one-on-one meetings with their direct reports twice a month and has a monthly meeting of all unit heads.

All supervisors hold regular meetings with their units and share those notes with other units. Supervisors are also encouraged to have regular meetings with their direct reports. As we have mostly worked remotely since March 2020, all of these meetings happen via Zoom or Teams.

Annual Performance Reviews

Beginning with the 2015 Academic Year the UMSL Libraries transitioned library staff from the existing inhouse forms to using online forms mandated by the UM System for all units. Librarians continue to use inhouse forms based around their work. The librarian forms are shared by the Thomas Jefferson and St. Louis Mercantile Libraries for librarians, curators, and unit heads.

Each librarian and staff member also submit an annual self-evaluation to their supervisor.

Annual Reports

Each department is required to submit overall annual performance reports. These are mostly quantitative (e.g., "how many people we served, how many items we cataloged"). These departmental annual reports are then condensed and compiled into the Libraries comprehensive annual report. The new Associate Dean has started discussions with the unit heads in the Thomas Jefferson Library for ways to make the annual reports more robust.

Collection Development Process

A funds allocation formula was applied to dealing with library monograph funds within the formal Collection Development Policy revised in 2010. The formula was recalculated to accommodate imbalances and address programs that have greater needs. This was done in order to reflect new technologies (e.g., purchase of e-books), as well as revisions in UMSL's procurement procedures. A similar process is planned for serials as the 2021 cuts are implemented. However, neither of these calculations adequately reflects the increased cost of electronic resources or the addition of new formats such as video. We have been addressing the need to increase our holdings of ebooks and streaming media in an ad hoc manner.

The Associate Dean, Head of Collections, and Head of Public Services have begun discussions around updating the collection development policy. Updates to the policy are expected in 2021.

Under the direction of the Head of Collections, all librarians participate in purchasing decisions for monographs and serials. Individual librarians are assigned as "Library Selectors" in subject areas congruent with their own academic backgrounds. Academic units designate individual faculty members to be "Department Liaisons" who interact with the selectors as the primary mechanism for communicating with the libraries.

The formula for allocating library monograph funds considers a number of relevant variables including size of departments, numbers of degrees awarded, average prices of publications, inflation rates, etc. It has been established using existing models currently extant throughout the academic library

community. Reconsideration of the monograph budget will take place prior to each future five year review.

Collection development also entails decisions regarding the subscriptions to appropriate periodicals. The process of cutting journals, when needed, previously used an online database of journal information developed twenty years ago by Christopher Dames. That database contained information about current journal prices, historic inflation rates, and journal impact factors. Individual academic departments were given access to the database in order to make their own decisions regarding which subscriptions to drop.

In our current budget cut, librarians reached out to their assigned departments and asked them to rank their journals and databases from most to least important and to note which items were needed for accreditation. This process, though not as scientific as the previous process, has to be done in a shorter time period than normal to ensure we are making our cuts before items need to be renewed. Moving forward, the library will utilize the work coming out of a campus program prioritization committee to make journal and database cut decisions.

The role of the librarians is to ensure the accuracy of the information and assist the departments in their deliberations. The specific titles of journals to be cut are determined in conjunction with members of the academic department responsible for those titles. However, sometimes this is not possible due to restrictions from the budget, publisher restrictions, or agreements made within the system.

Physical Space

The Thomas Jefferson Library librarians and staff have worked over the past few years to re-imagine the library. This process began under Chancellor George and continues under Chancellor Sobolik. The re-imaged library plan can be seen in the appendix. The plan includes a 24/7 accessible third floor with study rooms, an expanded cafe, and technology suites. A renovated third floor would be a haven for UMSL students.

The Thomas Jefferson Library has undergone one large change since 2015. The reintroduction of the library's offsite journals at ITE created a newly renovated space on the second floor of the library. This took months of planning as the space already housed material and was prone to water leaks. We emptied the space while simultaneously preparing the journals in ITE to move back into the library. Construction began in May 2020 and was completed in October 2020.

In the fall 2019 semester, Jaleh Fazelian, Lindsay Schmitz, and Pat Tansey worked with the Able-Disable Partnership to provide accessible study tables and an accessible computer station for students. We located both tables on the third floor of the Thomas Jefferson Library. We wanted to provide an accessible study room but would need to have considerable construction completed to provide such a space. We hope with a remodel of the third floor of the library that all study rooms would be accessible to all.

The Thomas Jefferson Library has regularly had to combat mold growing both in the library itself and in ITE, prior to its sale. The mold in the library is focused on the fourth floor and has been reported many times to Facilities. Facilities wiped down mold from air vents throughout the library and asked staff to report when and if the mold was regrowing. Facilities tested the mold and found it to be non-toxic. They provided the library with supplies to remediate the mold. Volunteers from the Thomas Jefferson Library staff continue to remediate mold in the collection that moved from ITE. We hope to complete this project by the fall 2021 semester.

The Thomas Jefferson library hosts the distinct “Library Research Commons” (computer lab) in a long-term collaborative effort with UMSL’s Information Technology Services (ITS). The Thomas Jefferson facility has been open since 2000. The Thomas Jefferson Library Commons consists of 70 workstations with full suites of proprietary software and access to printers. The facility offers technical support from ITS laboratory personnel, and research assistance from librarians staffing the reference desk adjacent to the facility. The Thomas Jefferson Commons is one of the busiest computer labs on the UMSL campus.

Until the summer of 2020, wireless laptops were available for check out at the Thomas Jefferson Library by faculty, staff, and students. The library returned the laptops to ITS for their program to loan the laptops to students without laptops during the Covid-19 pandemic. We hope to work with ITS in the future to circulate laptops again.

The building also houses open study areas on each level of and 11 study rooms, and a bibliographic instruction room with 22 student workstations which are available for library orientation and instruction upon faculty request.

Library Committees

The libraries have three established standing committees: Library Outreach, Library Assessment, Library Projects. There are three ad hoc committees: Strategic Planning and the Library Employees Activities and Development (LEAD) Committee. All committees seek to draw membership from multiple library departments. However, with declining numbers of librarians and library staff, all committees are currently under review by the Associate Dean.

Standing Committees

The *Library Outreach Committee* was created in February of 2006 in order to market and promote library initiatives, services, and resources to the campus community. Ongoing activities include maintaining a library Twitter account, a library Facebook page, and utilizing UMSL communications channels to advertise library services (e.g., public service announcements on the campus radio station regarding research consultation appointments). The Outreach Committee recently added an Instagram account. Lindsey Scales currently heads this committee and she has been approved to hire a student assistant to create a social media plan and content for the library’s social media presence. The Outreach Committee works with the Associate Dean to ensure UMSL marketing and communications receive pertinent campus-wide information to share.

The *Library Assessment Committee* consists primarily of professional librarians. The main goals of the committee are to analyze the effectiveness of the library instruction program and propose changes to the program based on library studies. As members have moved on from working in the library, the make-up of this committee will need to be addressed. The committee will likely undertake the work of assessing the utility of the Springshare Suite as an upcoming project.

The *Library Projects Committee* is involved with planning and implementing physical changes to the library. This included the establishment of Café TJ, the expansion of study areas near the LRC, and the design and implementation of a single service desk. In 2019 and 2020, the committee worked on updating the renovation plan for the 3rd floor of the Thomas Jefferson Library. The committee visited Southern Illinois University Edwardsville to see how they had transformed their library. There were plans to visit other libraries that had recently renovated but plans were held up due to Covid restrictions. Lindsay Schmitz and Jaleh Fazelian also held several meetings with staff from KI, a well-respected library furniture vendor, to purchase new chairs and generate ideas for a possible library renovation. The chair

purchase was delayed due to Covid-19 related budget cuts but we hope to fund this again in the near future. KI has floor plans for the Thomas Jefferson Library and is mocking up ideas for a third floor renovation. They are also mocking up plans for offices on the third floor, currently housing Administration, Librarians, and Staff to existing space on the fifth floor.

Ad hoc Committees

Additionally, the libraries regularly establish ad hoc committees and informal working groups in order to address short term issues. The most common of these are established when a professional position is open and requires a formal employment search. Another example is the Ad Hoc Summon Committee which meets occasionally to address issues with that software.

The *LEAD Committee* is primarily engaged in presenting internal programs, such as the ever popular Fifteen Minute Fridays, where employees create presentations in areas of expertise and interest to share with others. Other educational and social events are proposed and implemented by the LEAD Committee. This committee was solely made up of library staff and as their numbers have shrunk the workload was too great for the remaining staff. This committee is currently under review by the Associate Dean.

The *Strategic Planning Committee* performed a study of the benefits, impacts, and problems in implementing a single service desk combining circulation and reference activities in a single location. Implementation of the single service model was formally studied by analysis of other 10 academic libraries who have already implemented that approach. The documents produced by the Strategic Planning Committee have become a template for guiding the UMSL Libraries efforts. This committee submitted its final report to the Library Projects Committee and is currently defunct.

The *Signage Committee* is engaged in the work of creating new library signage. This committee began in the fall of 2019 and works directly with the Associate Dean. A library style guide was created to encourage specific font, color, and logo usage on library signage. The guide and logos are available in Teams for the library to use. Additionally, completed signage for the building is shared in Teams for staff to print and post as needed. This team consists of Jaleh Fazelian, librarian Judy Schmitt, and staff member Ted Ficklen. The team uses the product Piktochart to create signage. The Outreach Committee and incoming Social Media student worker, reporting to Lindsey Scales, also have access to Piktochart to create social media posts.

Assessment

Quantitative Assessment

Quantitative Assessment refers to data collected by the libraries including library gate count, reference desk transactions, number of books circulated, and interlibrary borrowing and lending activity. The libraries have focused on quantifying the use of electronic resources, such as databases and full-text online publications. We share this data with the Association of College and Research Libraries (ACRL), a division of the American Library Association, via their Integrated Postsecondary Education Data System (IPEDS). Sharing such information is a commonly accepted practice amongst academic libraries and we use data from annual reports to measure ourselves against our own past and against peer institutions.

One of the library's main roles is to efficiently administer university resources utilized on behalf of all university departments, focusing primarily on UMSL's academic programs. Quantitative assessment is necessary in order to determine if the library is most efficiently delivering its services and purchasing appropriate information resources. Given traditional, and currently more pressing, budgetary constraints, analysis of how efficiently resources are acquired and deployed is critical and necessary. It is vital to understand which resources are being used, and to what extent.

All data have verified the universal assumption that library users continue to prefer accessing full-text online resources. As we are increasingly in an online only world, continuing to provide these resources is critical to the success of the university's research endeavors. Hence, the libraries have devoted an increasing amount of effort to acquiring and deploying full-text databases and electronic books.

In order to ensure that information seekers can more quickly and readily acquire the full-text resources they need, the libraries have approached this in three ways:

Serials Solutions Article Linker

Article Linker allows users who identify an article in one database which is not available in full-text, to determine if that article is available in any of the other library databases. A user searching PsycInfo (a database of the professional literature of psychology) might retrieve a citation without available full-text; by clicking on the Article Linker icon, a user is directed to the full-text in a different database (e.g., JSTOR). Over ninety percent of Library databases have this feature enabled. Serials Solutions' statistical module gives information on what is being accessed down to journal title, and database levels.

OCLC Interlibrary Loan

The OCLC interlibrary loan system allows users to request articles from other libraries. The system is integrated with Serials Solutions' Article Linker software. When a database user is informed by Article Linker that there is no locally held article (online or in print), a single click of a mouse will automatically enter all information into an interlibrary loan request form. The information is immediately transmitted to UMSL's Interlibrary Loan office for disposition. The average response time for receiving an article is currently 48 hours. Journal articles are received in an electronic format which the user can retrieve at any time using any internet connection.

According to Serials Solutions statistics for UMSL, database users retrieved 352,356 full-text articles in FY 2019-2020 . At an estimated cost of \$15 per article (an amount consonant with traditional Interlibrary Loan costs), a virtual savings of \$5.3 million has accrued.

Cataloging of online resources

Upon acquisition of e-books and other online resources, the library catalogers in the Technical Services Department create records for the Merlin online catalog which connect users directly to the full-text resource.

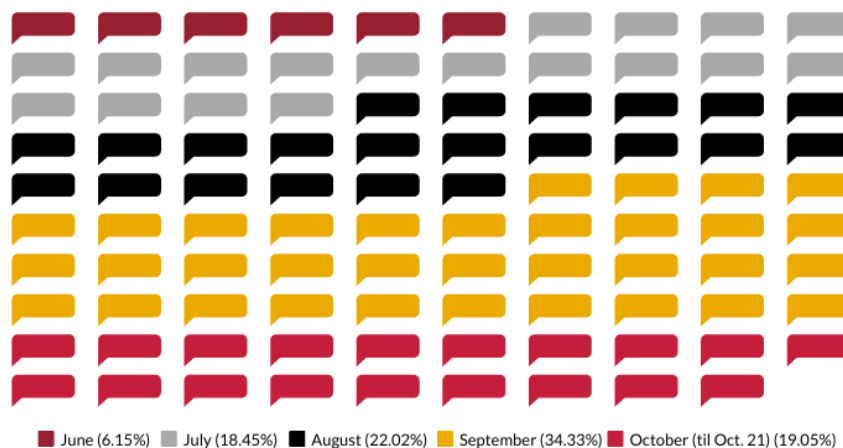
Usage statistics continue to validate the libraries' approach to utilize quantitative measures to drive purchases and cancellations of resources. Trends indicating continued use of online resources also lead to ongoing refinement of online access to resources using such tools as Article Linker and Interlibrary Loan. In the face of massive budget pressures, this approach has helped the library to manage journals and online resources available to the campus community.

Qualitative Assessment

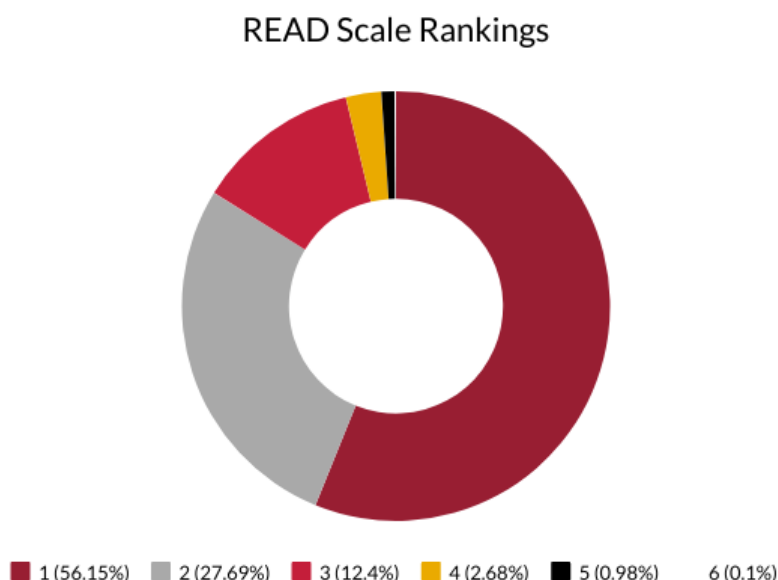
Through 2017 the Libraries distributed and analyzed user surveys and assessments to students in the basic English composition class required of all Freshman. These surveys are labor intensive in development, distribution, collection, and analysis and are completed every 2-3 years. In-person instruction classes have been suspended for most of 2020 due to the pandemic situation. As a result, surveys and assessment have been suspended for this year. The libraries recognize the importance of user surveys regarding library services.

Since the implementation of the SpringShare software suite, assessment has been embedded in many library interactions tracked by the software. Previous to using the Springshare software, library interactions were tracking duration of time, location of question, and type of question (reference, directional, etc). The new Associate Dean asked librarians and staff to rethink and expand the type of data collected to include data related to user status (student, faculty, member of the public), departments tied to the content of the question, and the question itself. The expansion of this data collection is to enable the library to better understand its core users, their needs, and how we can align the collections to better assist them. Each question is also ranked using the [Reference Effort Assessment Data \(READ\) Scale](#). The READ Scale asks the person inputting data to grade the difficulty of the question from 1-6. Librarians and Access Service staff use norming exercises to ensure they are grading questions within an acceptable range. Student workers at the PSD also input data about desk interactions. Students who encounter a question of a READ Scale value of 3 or higher refer users to a librarian for more detailed assistance.

Chat Stats (June-October 2020)



During the COVID-19 pandemic The SpringShare Chat software has become the main tool for delivering reference and informational services to the UMSL Community. LibAnswers, the SpringShare Chat service, was rolled out for public use on June 1, 2020, replacing a simpler commercial product which only allowed counting the number of transactions. Through the first four months of use librarians have performed 1006 total chats (through October 21, 2020). Starting with 62 separate chats in June, the month by month increase in activity is currently increasing at about 35 percent with 322 chats in September 2020. The new Associate Dean asked to create a proactive chat button. The proactive chat button prompts a user with a help message after they have been on a library webpage for 2 minutes. We will need to investigate if the proactive chat button led to this increase or if the increase is due to COVID-19, or a general uptick in chat usage once the pandemic subsides.



Qualitative assessment is embodied by automatic requests for users to rate the chat transaction on a 1 (Bad) through 4 (Excellent) rating scale, as well as allowing optional comments. About 28 percent of all users have chosen to rate chat transactions with an average rating currently at 3.93 out of 4.00. About one third of all patrons (n = 57) leaving rating scores have also left comments, almost universally positive. (See Appendix F).

Thomas Jefferson Library Accomplishments Since Last Review

Goals Set by Unit During Last Review

Goal 1

- Transition from multiple service points to a single service desk
 - This goal was accomplished in 2016 via the Strategic Planning Committee. The Public Service Desk is the only main service point for the Thomas Jefferson Library.

Goal 2

- Replace retiring Associate Dean
 - This goal was accomplished in 2019 with the hire of Jaleh Fazelian. Ms. Fazelian began her role in September 2019.

Goal 3

- Develop and staff an institutional repository
 - This goal was accomplished in 2016 with the hire of Helena Marvin as the Institutional Repository Librarian. Lena has created and maintained the IRL during her time at UMSL.

Thomas Jefferson Library Future Goals

Goal 1

- Evaluate Personal Librarian Program
 - This program will need to be assessed at the end of its trial year. Adjustments may need to be made to how the program works and how the library can work with faculty in the First Year Experience.

Goal 2

- Hire an Access Services/Interlibrary Loan Librarian
 - As discussed in the report, an Access Services Librarian is instrumental to the future succession and success of the Access Services Department.

Goal 3

- Investigate options for integrated cataloging systems
 - The MERLIN Integrated Library System Taskforce is currently working to submit a report to the UM System Library Deans Council to advise if the system should continue to invest in its current cataloging system or put out an RFP for other cataloging systems. The Taskforce is evaluating four systems on the current market.

The St. Louis Mercantile Library Association at UMSL

Growth and Expanded Accessibility of Collections for Student Success

The Mercantile Library, founded by philanthropically minded citizens in 1840's St. Louis, has grown into an internationally respected research library of world social history and cultural topical special collections spanning a vast array of formats, from rare books, manuscripts, photo archives and original art, to digital resources. Now in the twenty fifth year of formal affiliation with the University of Missouri and UMSL, the Mercantile Library has recorded growth and expanded accessibility of its 175-year-old collection in coordination with the University Libraries for strong student success. The Mercantile serves as the University Libraries Special Collections Department, while serving a broad outreach community across the city and nation as a general research library in the humanities. It remains linked to its historical origins as an early American membership-based library, through tradition, while directly updating and growing its mission in service to the campus community.

Outreach—exhibitions; community programs, colloquia, collaborations

The Mercantile Library remains committed to diverse and inclusive programs in its active schedule of exhibitions, public programs and other outreach initiatives which attract a broad-based community audience. In the last five years major exhibitions have included "Audubon and Beyond; Collecting Five Centuries of Natural History at the St. Louis Mercantile Library"; "Headlines of History; Historic Newspapers of St. Louis and the World at the St. Louis Mercantile Library Association;" and currently, "A Nation, a City, and a Library: Americana as a Way of Life at the St. Louis Mercantile Library for 175 Years." Each of these programs attracted hundreds of students and community patrons. Special lectures, tours and colloquial presentations by curatorial staff augmented the discovery afforded by the exhibits themselves and have helped build an understanding of how early American libraries such as the Mercantile "lived history" through the preservation of their collections. The Mercantile Library has created new educational collaborations with the Missouri Historical Society, which created a program on river history through direct use of the Mercantile's holdings. The Mercantile has also created a book arts printing laboratory with its fine printing collection at Central Print, based in underserved North St. Louis. The Mercantile Library continues to present smaller exhibitions, tours, panels and discussion groups focusing on the use of its rare, special collections as a gateway for underprivileged groups and first generation students from all walks of life, and these programs and exhibitions continue to attract praise and interest in the rare book and special collections community as models for making such collections accessible and relevant in a changing world. Exhibitions on women's history, transportation history, printing and book arts, and spotlights on various artists in the Mercantile's art gallery stress an environment of diversified cultural study.

Education with Special Collection resources-- graduate classes, graduate fellows; K-12 Anniversary Series

Graduate history seminars have been built around the Mercantile Library special collections in readings and topical bibliography, as well as on the study of history curatorship for the allied Museum Studies Graduate Program and are taught by the Director of the Library, a member of the UMSL history department faculty. These classes have taken advantage of the Mercantile primary sources and are presented in hands on settings when that has been possible. Each year two Museum Studies Graduate Assistants have benefitted from paid assistantships at the Library, managed by the Mercantile's Art Curator and Director of the Art Gallery; these students gaining practical firsthand skills in art registration, gallery design, mounting and exhibition installation. Curators here have also designed remote learning curricular exercises using the Mercantile's special collections for local teachers accessing the Library's website; on judging primary sources, analysis of secondary sources, and the use and assessment of historical sources in building new and inclusive narratives out of the challenging past record.

Conservation and Collections Care—paintings, lighting, micro-environments, scanning

To assure that the Mercantile collections continue to be accessible, an ambitious painting conservation program was initiated in 2019 which will benefit numerous works of art. Lighting for exhibition galleries has been reinstalled for better visibility coupled with preservation minded UV shielded light levels. As rare books are catalogued and added, works are assessed for protection in phase wrappers and other protective micro-environments in order to assure the resources here are passed down safely to the future. Special collections materials are routinely scanned to reduce handling of the original artifact. All of these techniques are those which benefit the largest number of items in the most cost-effective manner in order to serve the widest number of readers.

Resources and Collection Development

The Mercantile over the last several years has been most active in building its historic newspaper collection, its historic map collection, its Africana and African Americana collections and its collections of prints, graphics and local art. The historic newspaper holdings cover every state and locale in America and is among the largest holdings in the United States. It quadrupled in size in 2018-19. Historic atlases and rare single maps of various regions of America came in this same period as did large archives of art from various local artists. The Mercantile's holdings are focusing on newspapers and other special collections which in particular help document the stories of minorities and underserved communities in Missouri, encouraging research and investigation in these areas of study.

Digital Library

In the review period under analysis, the Mercantile's main digital research platform has been the revitalized Missouri Digital Library. The Mercantile, in a series of grants, has added tremendously to the holdings of MDL. The *St. Louis Globe-Democrat* digital archives is being added as are shorter files and single items of historic newspapers documenting in the real time of the past, the contentious birth of Missouri's statehood. Historic photographs, art and manuscripts are uploaded to the website each day and the Mercantile also acquired for student use the entire searchable archives of the *St. Louis Post-Dispatch*.

Publications

The Mercantile has continued to publish a series of books exposing the world to its collections, under its imprint and copyrighted by the UM Board of Curators. Added to monographic catalogues related to the aforementioned exhibitions, the Mercantile has produced publications on its artistic holdings related to river landscape, as well as its general collections. It collaborated with the Missouri Historical Society on the publication of a major exhibition catalogue on *The Mighty Mississippi* and a children's book on the life of one of its strongest donors, river historian and educator, Ruth Ferris, *Ruth's River Dreams*, and published other works of local interest, such as *The Lost St. Louis Riverfront*. Each publication attracts additional readers and researchers to the Mercantile Library's holdings.

Fundraising

The goals to grow dramatically in a useful and dependable way have always been the hallmark of the Mercantile before and after affiliation with the University of Missouri, and as an early library with a long established membership of supporters, it has continued to raise funds for its programs and the University Libraries as a whole. Since 2016, the Mercantile has continued to seek endowments and donations for staff funding, book funds and collection acquisitions, as well as for physical and digital preservation and conservation of library materials and general operating income, a sum estimated at approximately \$3,000,000 from external sources of support through private and public grants, annual giving, and in-kind donations, all immeasurably strengthening this department of special collections for our students and the wider community of scholarship.